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ABSTRACT

This document describes the organization, systems of management and governance, and financing of the San Diego Unified School District, serving over 122,000 students in California. The first chapter reviews the services provided by the district: instructional services, incorporating instructional personnel and programs; support service, including maintenance, secretarial, and other systems required for day-to-day operation of the district; and general services, the administrative and policy-making arm of the district. The second chapter discusses management and governance of the district, describing the organizational structure, factors affecting the development of that structure (such as district growth and both internal and external pressures), and issues that must be met by that structure (such as collective bargaining, legislation, and long-range planning). The final chapter explains district finances, identifying sources of income, restrictions on use of revenue, current issues affecting financing, and major aspects of district financial planning for the years 1976-1980. Extensive appendixes include the operating policies of the district's board of education, a policy statement guiding the superintendent's dealings with other governmental bodies, sample organizational charts for divisions and departments, a section of the district's administrative procedures manual, and samples of job descriptions for district personnel. (PGD)

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Management, Governance, and Finance

KINDERGARTEN-GRADE 12 PROGRAM

A CASE STUDY

Prepared for

IMTEC/OECD UNITED STATES BICENTENNIAL SEMINAR:

MANAGING CHANGE IN URBAN SCHOOLS

Prepared by

The San Diego Unified School District
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March, 1976

EA 012 445

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FOREWORD

This paper is prepared for the IMTEC/OECD United States Bicentennial Seminar: Managing Change in Urban Education, to be held in the United States during October, 1976. International Management Training for Educational Change (IMTEC) is a decentralized project of the Organization for Economic Cooperation and Development (OECD) in Paris, France.

The paper is designed to provide the reader with an understanding of major aspects of the San Diego Unified School District--its services, its management and governance structure, and its finances. Chapter 1 presents a description of the services provided by the district. These services are organized into three sections: Instructional Services, General Services, and Support Services.

Details regarding these services provide necessary background for a clear understanding of Chapter 2, Management and Governance, and Chapter 3, District Finances. References are made in both Chapters 2 and 3 to various details included in Chapter 1.

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INTRODUCTION

The San Diego Unified School District provides an education for more than 122,000 students in a cosmopolitan area covering 195 square miles. The school district is governed by a five-member Board of Education selected by the people to direct an educational program which meets the goals and learning aspirations of the people. The Board of Education sets policy for the operation of the schools in accordance with state laws and employs a staff to administer and carry out these policies. Board members are nominated by voters within the individual districts of residence. They are elected for four-year terms by voters in the total district to serve all citizens of the community. The Superintendent is the Chief Executive Officer, and is appointed by the Board of Education.

SCHOOL PHILOSOPHY

The public schools in San Diego exist to provide an educational program which will develop in all students the realization of their highest potential. It is the philosophy of the schools to provide educational programs which promote in students a sense of responsibility toward self, others, and society as a whole.

KINDERGARTEN--GRADE 12 PROGRAM

An education program is offered for students in kindergarten through the twelfth grade. At the elementary level, a program is provided for children starting at age five through the sixth grade. Junior high schools serve the students enrolled in Grades 7-9. This is the school level where students start developing attitudes and skills which may be directed toward a career to be entered upon graduation from high school or after further college or other post high school education. In the senior

high schools, Grades 10-12, students have the greatest choice among more than six hundred subjects, all designed to provide the broadest range of required and elective courses. Vocational and career courses are offered which often include on-the-job experience. In addition, summer classes and independent study courses are offered which open further doors to student initiative.

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CHAPTER 1

ORGANIZATION FOR SERVICE

CHAPTER 1

ORGANIZATION FOR SERVICE

The organization of the San Diego Unified School District is built upon the concept of service. Numerous services are offered to the 122,000 students attending its schools. These services consist of INSTRUCTIONAL SERVICES, SUPPORT SERVICES, and GENERAL SERVICES. The chart on the following page identifies the various components of the three service units.

INSTRUCTIONAL SERVICES

INSTRUCTIONAL SERVICES represent the core of the district's service program. Within this unit lie all those programs which are directly associated with imparting instruction to the students of the district.

INSTRUCTIONAL SERVICES

Teachers
Counselors
Principals
Community and Instructional Aides
Program Development and Evaluation
Inservice Education
Career Development
Volunteers
Exceptional Child Services
Federal and State Special Projects
Bilingual-Bicultural Programs
Instructional Media Services

Teachers, Aides, Volunteers

Approximately 5,091 teachers are authorized by the Board of Education to provide an instructional program for students in K-12. Included are regular classroom teachers, special teachers, and resource teachers. A professional staff of special teachers and resource teachers is needed for

San Diego City Schools Organization

SERVING MORE THAN 122,000 STUDENTS.

INSTRUCTIONAL SERVICES

- Teachers
- Counselors
- Principals
- Community & Instructional Aides
- Program Development & Evaluation
- Inservice Education
- Career Development
- Volunteers
- Exceptional Child Services
- Federal & State Special Projects
- Bilingual-Bicultural Programs
- Instructional Media Services

SUPPORT SERVICES

- Custodial & Maintenance Services
- Secretarial & Clerical Services
- Health Services
- Food Services
- Purchasing
- Security
- Warehousing
- Data Systems
- Payroll
- Instructional Supplies

GENERAL SERVICES

- Board of Education
- Superintendent
- Finance
- Personnel
- Legal & Legislative Services
- Employee Relations
- Urban Affairs Services
- Public Information Services
- Planning & Research Services
- Systems & Procedures
- Facilities Planning

instruction in areas such as English as a second language, language arts, career education, and vocational education. Special teachers are also provided for those who are physically, emotionally, and educationally handicapped; those who are mentally retarded; those who have learning disabilities; and those who are mentally gifted and talented. Community and instructional aides, substitute teachers, classroom assistants, and volunteers also assist with the instructional process in all classrooms.

Counselors and Pupil Services

Service programs extend student achievement and development, and include pupil attendance services as well as counseling and guidance services. Pupil attendance services promote and improve school attendance. Special counselors provide for: early identification of non-attendance patterns; promotion of positive pupil and parent attitudes toward attendance; analysis of causes of non-attendance; early action on problems of non-attendance; and enforcement of compulsory attendance laws. Counseling and guidance services are needed to acquire and complete information identifying the individuality of each student and to help students assess and understand their abilities, educational needs, and career opportunities. More than 300 certificated counselors are available to assist parents and pupils in educational and career planning and with personal/social counseling. School psychologists are available for individual educational diagnosis and planning.

Principals

Principals and vice principals are necessary for the operation of educational facilities and instructional programs. In the City of San Diego there are 193 educational facilities. These facilities include:

122 Elementary Schools
19 Junior High Schools
12 Senior High Schools
2 Evening High Schools
1 Career High School
30 Children's Centers
3 Continuation High Schools
1 K-12 Alternative School
3 Special Schools for the Handicapped

Approximately 249 principals and vice principals are needed for the San Diego City Schools. Principals assume responsibility for the supervision and administration of the schools. They provide leadership for the planning, development, implementation, and evaluation of all affairs of the school; and they provide general control and supervision of all students, as well as certificated and classified employees assigned to their school. Vice principals act as co-administrators with school principals.

Program Development

The schools in San Diego continuously prepare to equip students for meeting the new and ever increasing challenges of a constantly changing society. There is always more to learn, a better way to teach, and a more effective and meaningful educational experience for the children and youth of the city.

As in private industry, funds must be continuously invested in innovative ideas if success is to continue. To insure continued success for district students, the district conducts an ongoing program of improvement, research, and development.

A team of outstanding educators, including directors and supervisors, curriculum specialists, consultants, coordinators, and resource teachers offer a program of leadership, guidance, and assistance. Program development teams are provided for subject areas which include art, bilingual education, early childhood education, foreign language education, language arts, mathematics, music, multiethnic studies, physical education and health, science,

and social studies. The teams emphasize curriculum innovation, development, implementation, and instructional improvement. Services provided include assessing needs, establishing goals and objectives, providing on-site assistance for teachers and administrators, and maintaining a sound program for acquisition and development of instructional material.

Program Evaluation

Evaluation services provide for the appraisal and evaluation of district programs and projects on a continuous and systematic basis. The evaluation program is designed to insure consistency with the educational goals of the district and the objectives of programs and projects. These services consist of:

1. Coordinating all evaluation programs within the district.
2. Providing consulting and monitoring service to planning and program development.
3. Administering a pupil testing service; including test ordering, distribution, scoring, reporting, consultive services to schools, and maintenance of a cummulative pupil data bank.
4. Coordinating the administration of state and national testing programs.
5. Developing evaluation instruments and tests.

Inservice Education

A year-round inservice instructional program is provided for district school personnel. A professional growth and staff development team works cooperatively with teachers, administrators, and outside agencies to:

1. Assess staff development needs and develop and implement programs to meet these needs.
2. Provide inservice classes for specific needs or for particular groups of staff members. Participants earn university or district credit.
3. Organize workshops for curriculum briefings, skill building, or maintenance.
4. Develop special programs of demonstration lessons, cross school visits, conferences, and special purpose meetings.

Career Development

It is the policy of the San Diego City Schools as declared by the Board of Education that every high school senior will have learned an entry-level skill in a career field upon graduation. To facilitate this policy, a career education unit provides all students at both the elementary and secondary levels with information, instruction, counseling, and educational opportunities which will lead students to the career of their choice. Programs are provided in a wide spectrum of career areas.

Exceptional Child Services

Special education programs are offered to meet the individualized needs of all students. There are students who are mentally gifted and talented, physically handicapped, educationally handicapped, and mentally retarded. For these populations, very specialized services are essential.

Mentally Gifted and Talented. High potential students are stimulated and challenged in a district/state supported program that features cluster classes, self-initiated studies, seminar, independent study courses, and the total resources of the community.

Physically Handicapped. Instructional programs are provided for students who are homebound or hospitalized, who are deaf or have severe hearing problems, who suffer from aphasia, or who may have any other physical handicap which requires special learning techniques and attention.

Learning Assistance. Special facilities are offered to young people who are handicapped academically. Individualized attention provides an opportunity for each child to achieve maximum personal, vocational, and academic growth.

Development Center. A special development center for handicapped minors is provided for students who have multiple handicaps and are severely and profoundly mentally retarded. The needs of these children cannot adequately be met in the regular classroom or in other regular district special education programs.

Federal and State Special Projects

Special projects pertain to all those special programs funded by state

and/or federal agencies.

The partnership of the federal and state governments along with the district helps to provide supplemental funding to meet the unique and specific educational needs of particular groups of students. Funds also provide for research and the testing of innovative educational ideas relating to instructional programs. Awards received are based upon competitive grants for which the district applies throughout the year. These funds supplement and do not supplant district funds used for the general educational program.

The compensatory education program and the educationally disadvantaged youth program are two examples of special projects. Under compensatory education, varied programs are directed toward improving opportunities for educationally disadvantaged youth through the use of additional personnel and instructional resources. Currently, compensatory education projects are operating in 38 elementary schools, six junior high schools, and two senior high schools.

The state provided $1.7 million in 1975 through Senate Bill 90 to fund instructional programs which will compensate for the educationally damaging effects of poverty, language barriers, and/or pupil transiency. Approximately 4,000 additional students may now participate in compensatory education programs. Examples of other special projects include state preschool programs, early childhood education programs, and bilingual-bicultural programs.

Bilingual-Bicultural Programs

In the San Diego City Schools, there are approximately 12,000 students whose home language is other than English. For these students, many of whom have limited English speaking communication skills, the district provides bilingual-bicultural educational programs which recognize, accept, and value

the positive qualities of a multicultural-multilingual society. Several state and federal programs provide additional funding for district bilingual-bicultural education programs. In addition, the district draws from a large variety of resources to meet needs of students. Included are staff such as resource personnel, cross-age tutors, secondary schools and colleges, parents and community members. Bilingual-bicultural programs emphasize areas such as student self-concept, English communication skills, second language communication skills, pride in one's culture, and appreciation of other cultures.

Instructional Media Services

Instructional media services are available for both students and staff to enrich, extend, and supplement the total classroom learning experience. Service facilities include individual school libraries, library media centers, the Instructional Media Center, and the Professional Library.

Instructional media services provide for selection, purchase, cataloging, and distribution of audio-visual materials and library books for all K-12 district schools. Learning kits are circulated and refurbished; bibliographies of instructional materials are prepared; teachers and administrators are provided with assistance and training in the use of AV equipment and materials; and schools are provided with assistance in acquisition, cataloging, inventory, circulation, and budget management. Other services include technical and professional assistance for selection of instructional materials, use of CCTV equipment, and development of closed circuit TV.

SUPPORT SERVICES

Other services offered by the San Diego Unified School District are indirectly related to classroom instruction, but they are essential to the educational process and necessary for operational functioning of all INSTRUCTIONAL SERVICES. These ancillary services are known as SUPPORT SERVICES. See page for the district organization chart.

SUPPORT SERVICES

Custodial and Maintenance Services
Secretarial and Clerical Services
Health Services
Food Services
Purchasing
Security
Warehousing
Data Systems
Payroll
Instructional Supplies

Custodial and Maintenance Services

Operation and maintenance of school buildings and school grounds is essential for a good educational environment. The school environment must be comfortable, pleasing, safe, well-equipped, and inviting for efficient teaching by teachers and maximum learning by students. Custodial and maintenance services offered by the district provide for full operation of all school buildings and grounds. Property, including buildings, grounds, and equipment, is repaired; obsolete and worn out equipment is replaced; and damaged or lost property is repaired or replaced.

Secretarial and Clerical Services

Secretarial and clerical services provide office support at various levels within the district--elementary schools, junior high schools, senior high schools, and Education Center departments. Secretaries and clerks

assist administrators in office management and organizational procedures. Correspondence and reports are processed; appropriate records and files are maintained; dictation, typing, and duplication of material is handled, conferences, meetings, and appointments are arranged and scheduled; and all other office functions as may be required are performed.

Health Services

Physical and mental health services which are not direct instruction are provided for the students of the district. The district maintains its own health services department, which includes physicians, school nurses, clinics, drug and narcotic education specialists, and social health specialists.

Food Services

The food services program is a non-profit program. The expenses of managing the food services program are covered by the income derived from cafeteria sales and federal and state subsidies.

The program includes maintenance of the school cafeteria and the preparation and serving of regular and incidental meals, snacks or lunches in connection with all school activities. During 1974-75 school year 9,177,171 lunches and 258,873 breakfasts were served through the district food services program. On the average daily basis this amounted to 51,852 lunches per day and 1,471 breakfasts per day.

Regulations for school lunches are set by the United States Department of Agriculture. Requirements, or menu patterns, are specified for nutritional adequacy and quantity of food for pupils at the preschool, elementary, and secondary levels.

Purchasing

The district expends over five million dollars for the purchase of books, supplies, and equipment replacement. To facilitate selection and processing, a Purchasing Department is maintained to procure all supplies, equipment, and designated services necessary for the operation of the district.

Security

The Security Department protects staff, students, and property of the district; develops, administers, and coordinates security plans and programs of the district; organizes and directs a staff of personnel engaged in providing security and protective services throughout the district; and provides liaison with the San Diego City Police, Fire Department, and disaster or emergency services.

The San Diego City School's Security Department was established when the city police could no longer provide the necessary protection of property, staff, and students. Increasing violence on school grounds and increasing vandalism reached such a level that it became necessary for the district to provide its own security system. Security agents are now placed on each high school site and on a few junior high school sites. A night patrol checks all school properties, responds to intrusion and fire alarms as well as calls from citizens, police, and fire departments. A small central investigation team investigates vandalism, attacks, and trespassing on school property.

The department works closely with the School Task Force of the San Diego Police Department. All attacks upon staff and/or students are investigated. All fires and acts of vandalism are also investigated with the close cooperation of city police and fire departments. Attempts are also made by the department to recover property and to obtain restitution for destruction

of property.

Warehousing

Due to the size of the San Diego Unified School District and the amount of money expended on its purchases, it is financially feasible for the District to maintain warehouse services. School warehouses are maintained and operated for school supplies, equipment, and instructional materials. Storage as well as transportation to and from schools is provided for all District equipment and supplies through warehouse services.

Data Systems

Data Systems provide for the planning, coordination, development, and implementation of information systems and other services related to the use of computers. A central computer facility is maintained to meet administrative and instructional needs. Computerized information systems are utilized in areas such as finance, personnel, student services, and evaluation services.

Payroll

A central accounting office is maintained to handle procedures and controls for efficient operation and security of all accounting functions and payment of bills, salaries, and wages.

Instructional Supplies

Many different kinds of supplies, materials, and equipment are provided for student use. Included are regular classroom textbooks, supplementary textbooks, supplementary supplies, films, filmstrips, tapes, televisions, computers, cassettes, typewriters, recordings, cameras, instructional displays, charts, models, and learning machines.

The district organizational structure includes a Programs Division which assumes as one of its responsibilities, providing aid to teachers and

administrators in the evaluation, selection, purchase, and development of materials for student use. In addition, the Programs Division, maintains a Material Development Office which handles all curriculum writing projects and publications sponsored by the division. The office provides: (1) editorial services and consultant services regarding the preparation, printing, and distribution of publications; (2) graphic arts consultation and services for publications, visual presentations, designing and preparation of models, original illustrations, and posters; (3) photographic services including still photography, motion picture filming, and film processing; and (4) audio tape duplicating services. The office also maintains and distributes a district inventory of all curriculum publications and processes out-of-district requests for publications.

GENERAL SERVICES

GENERAL SERVICES represent the administrative segment of the district's service program. Within this unit lie all those programs which are directly associated with administration, planning, policy making, and organization of the entire school district. See page 5 for organizational chart of services offered.

GENERAL SERVICES

Board of Education
Superintendent
Finance
Personnel and Employee Relations
Legal and Legislative Services
Urban Affairs Services
Public Information Services
Planning and Research Services
Systems and Procedures
Facilities Planning

Board of Education

A five-member Board of Education, under the law, is charged with the responsibility of setting policy for the San Diego Unified School District. Board members are nominated by voters within the district of their residence and elected for four-year terms by voters from the entire district. The five-member Board then serves all citizens of the total school district. To carry its responsibility, the Board employs a Superintendent of Schools as its chief administrative officer. For details regarding Board policies see Appendix A, "Policies of the Board of Education--San Diego Unified School District."

Superintendent and Deputy Superintendents

Superintendent

The Superintendent of Schools is the Chief Executive Officer of the Board of Education and the Chief Administrative Officer of the San Diego

Unified School District.

Primary responsibilities include carrying out the decisions, actions, and policies of the Board, developing and interpreting district policy, exercising control over all district employees and over the quality of all programs in the district. Progress and needs of the district are reported to the Board; administrative rules and regulations are developed; staff activities requiring Board action are recommended; rules and regulations are implemented; and plans and procedures are reviewed.

The Superintendent also serves as the Board's secretary and as chairman of the Executive Council. The Council maintains top level communications on districtwide policy matters and serves as a review group when group judgement and experience are either desirable or necessary to the decision-making process.

Deputy Superintendent for Administration

The Office of the Deputy Superintendent for Administration provides leadership, supervision, and top management coordination for all general administrative and staff support programs in the district. Through this office, close interdivisional and interdepartmental cooperation is facilitated among all areas of the school district's administration.

The Deputy Superintendent for Administration is directly responsible and accountable for the following operations: Business Services Division, Personnel Division, Planning and Research, District Finance Administration, Budgets and Cost Controls, Accounting, Data Systems, Evaluation Services, and Internal Auditing. Management functions are exercised by delegating authority to appropriate individuals; holding regularly scheduled meetings; planning and recommending policies and goals for operation of general administrative offices and school support divisions; recommending the combined budget for all organizational units under direction of the office; preparing necessary

reports; and reviewing plans and procedures. The office aids in resolving administrative problems, initiates and directs programs for expanding and amending district budgeting processes, provides for citizen involvement in school governance, and provides assistance and advice to the Superintendant by attendance at all Board of Education meetings.

The Deputy Superintendent for Administration serves as project coordinator for the district's $93.4 million school building program, designed to serve growth areas in the district. In addition, he serves as a member of the Executive Council and as acting Superintendent in the absence of the Superintendent.

Deputy Superintendent for Operations

The Office of the Deputy Superintendent for Operations provides top management coordination and supervision of all educational programs and schools of the district. It also provides communication and policy direction from the Board of Education and the Superintendent to the school site administration and to the instructional staff of the district. The objective is to furnish the most effective conditions for successfully carrying out the approved educational programs within the limits of available funds. The office maintains budget supervision over all operations divisions, schools, and programs.

This office carries out its purpose through delegation of authority through four operating divisions; Elementary, Secondary, Programs, and Student Services. These divisions are each under the leadership of an assistant superintendent. This office exercises its coordination, supervision, and leadership function through regularly scheduled meetings with division assistant superintendants, site visitations, review of plans, procedures, and a variety of reports. The office assists: (a) in the resolution of operational problems through staff meetings, community meetings, and special reports, and

(b) in the development of management policies and operational procedures. It coordinates the development of special studies and reports, and provides assistance and advice to the Superintendent by attendance at all Board of Education meetings.

Finance

The Finance Department directs all of the district's financial management activities. The department, under the direction of the controller, organizes and directs the operation of the Accounting Department and the Budgets and Cost Controls Department.

Accounting

The Accounting Department maintains procedures, records, reports, and analyses for the purpose of providing timely management information, compensating employees and vendors, meeting federal and state requirements, standing audit, and assuring the appropriate operation of all district fiscal affairs. The department is organized into four sections:

1. The Financial Accounting Section
2. The Resources Control and Analysis Section
3. The Distribution and Control Section
4. The Food Services Accounting Section

Budgets and Cost Controls

The Budgets and Cost Controls Department provides the school district with the financial planning and management required to prepare, file, and manage the district's budget. The department is responsible for an annual budget of approximately $250,000,000 which includes eight major funds, 26 sub-funds, 210 special project grants, a financial data base with 30,000 accounts, and approximately 9,200 authorized positions.

Personnel and Employee Relations

The Personnel Division Administration Office provides direction to a

comprehensive personnel administration program serving all organizational units of the school district. The office is under the leadership of the Assistant Superintendent, Personnel, who provides advice and assistance to the Superintendent and the Deputy Superintendents, and serves as the district's affirmative action officer. Direction is provided for the development, implementation, and coordination of personnel policies and procedures; development of long-range manpower plans; development of Personnel Division goals, objectives, and standards of performance; and coordination of all division activities. There are three major departments under the direction of the Assistant Superintendent, Personnel: Employee Relations/Services Department, Personnel Administration Department, and Personnel Operations Department.

Employee Relations/Services Department

This department negotiates for the district with employee organizations, processes grievances, and administers employee insurance programs and employee retirement programs.

Personnel Administration Department

The Personnel Administration Department is responsible for implementation of the district's affirmative action program; the recruitment, selection, employment, and promotion of certificated and classified employees; control of credentials for certificated employees; the administration of performance evaluation plans for classified and certificated employees; the separation and termination of employees; the administration of long-term leaves of absence; and management of substitutes for teachers and classified employees.

Personnel Operations Department

The Personnel Operations Department is responsible for wage and salary administration, position classification, payroll preparation, the unemployment insurance program for classified employees, administration of short-term

leaves of absence, maintenance of employee records, preparation of management reports, administration of federal manpower programs, management training programs, and the volunteer coordination program.

Legal and Legislative Services

Legal Services

The Legal Services Office provides full time, professional legal counsel and representation for the Board of Education, the Superintendent, and the staff on school district matters. The office prepares and conducts litigation, administrative law hearings, and grievance arbitration hearings; renders written and oral legal opinions; prepares or reviews all contracts, rules, regulations, and other legal documents; prepares all documents incident to the notice, call and conduct of tax override and school board elections; and provides inservice education for the staff. Legal assistance is provided in the drafting of proposed legislation and in the analysis of pending bills. Legal advice is also provided to the staff with respect to the need for legislation to solve specific problems.

Legislative Services

Legislation has a profound effect on district programs and costs. For this reason, administrators directly accountable and responsible for specific programs must keep informed of existing and proposed legislation pertaining to their respective areas of responsibility, and they must be prepared to initiate proposed changes in such legislation as necessary to improve programs and costs.

To aid in the development, approval, and implementation of the legislative program, a Legislative Liaison Specialist serves as an assistant to the Superintendent of Schools and is assigned to state and federal legislative duties. The Legislative Liaison Specialist represents the district in

legislative activities at the state and federal levels and provides the Superintendent and the Board of Education with information, interpretation of legislation and legislative activities, and timely reports on the status of pending legislation.

Each year, the Superintendent and the Board approve the general legislative policy or position of the district on major legislation to be considered or proposed that year. For detail regarding the 1976 legislative policy statement, see Appendix A, "1976 Policy Statement Governing the Legislative and Executive Governmental Branch Advocacy and Information Program of the San Diego Unified School District."

Urban Affairs Services

The Urban Affairs Office: (1) plans, organizes, and coordinates special programs relating to intergroup needs and services, and (2) maintains liaison between the district and local ethnic and cultural groups. Leadership is provided in the development of policies and procedures designed to promote equal opportunities for pupils and staff in the areas of basic education, vocational counseling, teacher placement, administrative promotions, and school attendance boundaries. Intergroup relations are coordinated and effective community and school district relations are promoted. Such efforts are related particularly to experimental and special projects concerned with urbanization problems, minority groups, and disadvantaged pupils.

Public Information Services

The Public Information Office coordinates, organizes, and conducts districtwide information programs on school activities, programs, and issues. The Superintendent and staff are advised and kept informed of all pertinent matters affecting public and staff relations and information; informational efforts among all district departments are coordinated; district policies and

procedures are interpreted to the staff and the public; and a working relationship is maintained with the news media, business, civic, and community organizations.

To facilitate communication, various activities related to broadcasting media are conducted. These activities include: providing a 24 hour-a-day code-a-phone service to report news announcements of board meetings; providing news releases to the media highlighting special and continuing educational programs; distributing memoranda to news editors suggesting possible feature stories or spot news stories; and preparing radio and television public service announcements.

Other activities involve the preparation and distribution of printed materials. A weekly "Staff Bulletin," containing news of the district, is developed, printed, and distributed regularly throughout the year. Also, a variety of booklets, brochures, pamphlets, etc., are periodically developed and published to meet the information needs of the staff and the public. Such publications may include details regarding the enrollment, district financial elections, statistical reports, and budget information.

Planning and Research Services

The Planning and Research Department coordinates the district's long-range planning activities and provides research and statistical data, including enrollment estimates, to the district's administration. Research and survey activities within the district are coordinated as well as information requests from outside the district. The department submits to the district recommendations for changes in attendance area boundaries and is responsible for implementing the district's policy for determining availability of schools.

Systems and Procedures

The Systems and Procedures Office develops and administers a district-wide policies, regulations, and procedures system governing the administration and operation of programs and activities conducted by the district. Detailed purposes and objectives include the following:

1. To provide for the establishment and clarification of policies, regulations, and procedures for the governance of district activities and to facilitate compliance with federal, state, and local laws and requirements.

2. To define responsibility and authority including controls and relative roles of divisions, departments, and schools, and to provide for orderly change.

3. To provide a basis for coordination and systematic improvement of district operations, gradually incorporating the best thinking and experience of the persons involved.

4. To provide a basis for work simplication, minimal duplication of effort, and improved organization efficiency.

5. To save time and effort on the part of users of procedures manuals. A four-volume set of procedures manuals provide for prompt, complete, accurate, and up-to-date information on district activities. (Approximately 600 sets are in use.)

6. To strengthen and support supervision, employer-employee relations, and school-community relations.

7. To preserve policies, regulations, and procedures during times of personnel change.

8. To orient new employees and those new in particular positions, to acquaint others with district programs and activities, and facilitate communications generally.

9. To achieve uniformity of interpretation and operations when necessary.

This office is involved in organizational development and planning, including the committee, council, and conference structure, which have a significant impact on organizational effectiveness. Administrative and management processes are monitored for adequacy, effectiveness, and need for change.

Facilities Planning

The Land and Facilities Planning Department designs, prepares, and administers programs for the production of new school housing and the replacement and/or remodeling of existing housing where and when needed. The department also develops financial programs, scheduling programs, and special election programs to finance such housing.

CONCLUSION

Instructional Services provided by the district are considered to be highly effective for meeting the needs of the student population. Effectiveness is partially measured by: (1) the many evaluation programs administered to measure student achievement, (2) the quality of district personnel, and (3) the multitude of financial grants received by the district for state and federal projects. The district must compete for such grants which are generally awarded on the basis of exceptional high quality, potential for success, and innovation. Also, a key factor which determines whether or not the district receives a grant is the degree to which a program is designed to meet the specific needs of the student population.

During the 1975-76 school year, the district was granted $15,199,000 in supplemental funds for its special projects. For 1976-77, a total of $21,310,000 is estimated, as of March 1, 1976, for 172 special projects.

Supplemental funding received aids the district in the services it can provide, but it also restricts the district in its control of such funds. Funds received are restricted in their use by the issuing agency. State and federal agencies provide monitoring services to insure that programs operate according to guidelines and that funds are used appropriately. Thus, the state and federal government plays an increasingly important role in district education.

A noteworthy effect of state and federal restrictions has been the degree to which community/parent participation is mandated for program planning, development, implementation, and evaluation. This has resulted in increased community/parent interest and control. In addition, it has contributed to forcing the educational community to be more accountable for its programs.

It should be pointed out that although programs are considered effective, continuous budget cuts tend to reduce the number and kinds of resources available to maintain the present level of educational services. Additional funds would strengthen the resources available to students. They would provide for more teachers, more student materials, more resource and consultant assistance, more research and experimentation, better transportation services, better administrative services, etc. These are all factors which serve to improve and strengthen the quality of education provided to district students.

CHAPTER 2

MANAGEMENT AND GOVERNANCE

CHAPTER 2

MANAGEMENT AND GOVERNANCE

The formal organization is a mechanism or framework for defining division of work, reporting relationships and delegation of authority, and for defining areas and limits of responsibility. This framework permits the achievement of organizational goals in the most efficient and effective manner. The exact limits of responsibility, the tasks to be accomplished, and the coordination required are identified in job descriptions of the individuals represented by boxes on an organization chart. The manner in which tasks are accomplished is defined in an administrative organization or procedures manual. The principles which must be adhered to in accomplishing the tasks are defined in the policies of a school system's board of education.[1]

MAJOR ORGANIZATIONAL PLANS FOR MANAGEMENT AND GOVERNANCE[2]

There are four major plans of organization distinguished by Allen.[3] The first three are commonly found in all types of systems with the exception of the very smallest. The last plan is found only in very small systems which do not hire a superintendent. Major organizational structures for the top executive function are presented on the following page.

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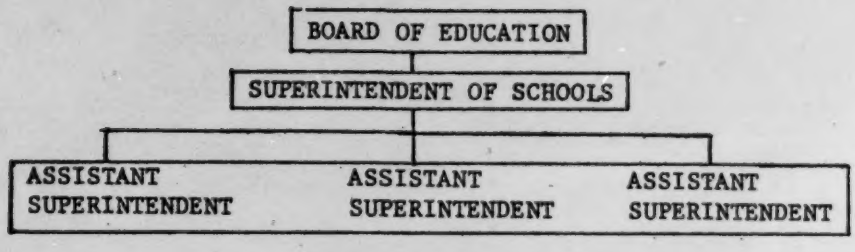
[1]"Structuring the Administrative Organization of Local School Systems," ERA Circular, No. 2 (April, 1970), pp. 1-9.

[2]Ibid, pp. 7-9.

[3]Louis A. Allen, Management and Organization (New York: McGraw-Hill Book Co., 1958), p. 255.

1. A chief executive alone.
2. Division of functions between a chief executive and a chief operating officer.
3. Division of functions between a chief executive, a chief operating officer, and a chief staff officer.
4. Group organization (board or committees) for the chief executive function.

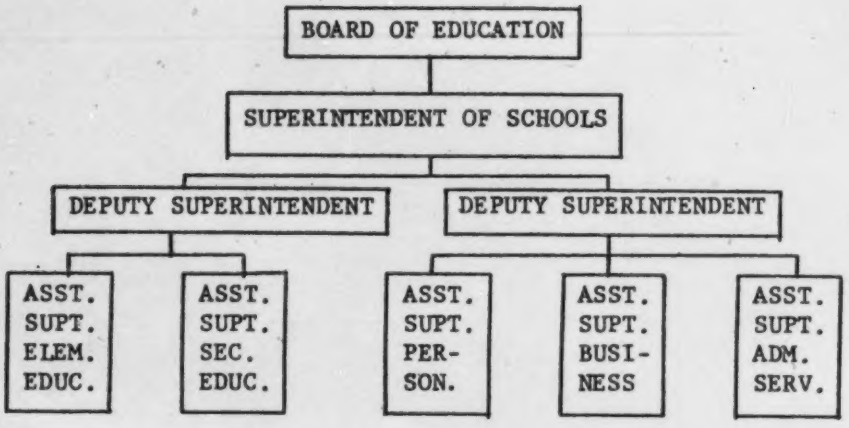
Type 1



The chart above illustrates the organizational structure with a chief executive at the top level of management. With this pattern and other variations of it, the chief executive directly supervises all line and staff departments. This allows for close personal knowledge of all operations and administrators because: (1) the chief executive is responsible for evaluating the administrators; and (2) administrative heads have direct access to the chief executive. These points represent the major advantage of the "Type 1" plan.

The major disadvantage is the heavy responsibility placed on the chief executive. Other disadvantages involve lack of opportunity for advancement by assistant superintendents, and a tendency to alleviate burdens by appointing more and more general staff assistants to handle aspects of the chief executive function.

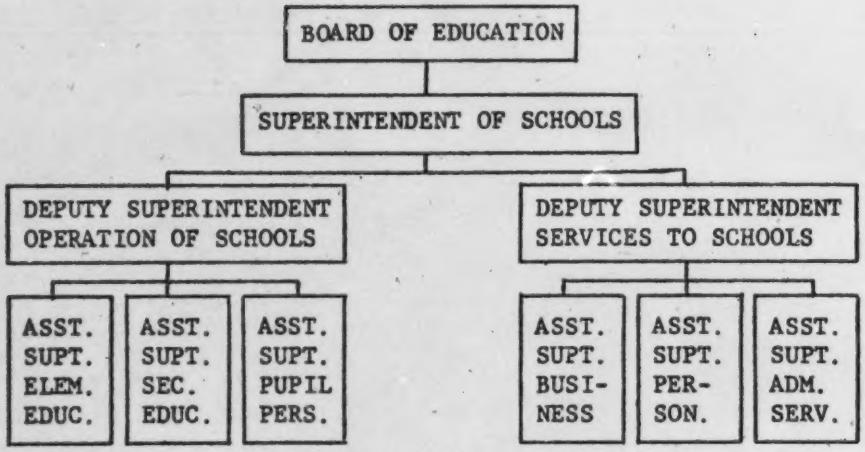
Type 2



Some disadvantages of the "Type 1" organization can be eliminated by appointing a chief operating officer. In the second major kind of organizational structure, duties are divided between the superintendent and the chief operating officer. This is usually a deputy, associate, or assistant superintendent. In this structure, each person has the responsibility for a defined number of departments. Usually, the superintendent heads up the staff departments, and the chief operating officer the line departments.

In the "Type 2" organization, the chief executive is usually responsible for those departments affected by long-term aspects of the system. These include planning and development, policy-making and financial planning, capital expenditure, public relations, and legal affairs.

Type 3



A third type of organizational structure is feasible, and almost essential, in very large school systems. In this type, the superintendent supervises only two positions--a chief operating officer for managing school operation functions and a chief staff officer for managing all service functions.

In the chart above, all staff (service) functions are grouped under a chief staff officer. Variations of this pattern, however, do exist. In actuality, the superintendent may maintain some staff departments necessary to assist in the executive functions, particularly planning and policy development. Such staff departments remain under the direct jurisdiction of the superintendent.

The "Type 3" plan has the same disadvantage as the "Type 2" plan regarding chief executive contact with department heads. (In the example above, the department heads are represented by assistant superintendents.) This problem can, however, be easily managed. The "Type 3" plan is considered to be highly effective and efficient for very large school systems.

Departments assigned to the chief operating officer are those connected with day-to-day operation of running the schools. These activities are managed according to the policies and goals outlined by the board of education and the superintendent. Policies and goals provide the general framework within which the chief operating officer makes decisions. For execution of policies and plans and achievement of goals, the chief operating officer is responsible to the superintendent, who then delegates some of the executive responsibilities to him.

As these two people carry out the duties of their positions, they may utilize specialized staffs and even general staff members. The nature of such staffs necessarily varies according to (1) goals of the system, (2) size of the system, and (3) capability of the executives.

The "Type 2" organizational plan lends itself to several advantages. The chief executive is relieved of many detailed and routine operations; planning functions are separated from executive functions, thus allowing for a system of checks and balances; and an experienced replacement is available for the chief executive.

There are, however, disadvantages also. In this plan, line heads are responsible to the chief operating officer and action must be taken through the chief operating officer. Thus, the chief executive is literally separated from contact with line department heads. This can be managed if line heads understand they have access to the superintendent if matters can't be settled with the chief operating officer.

Type 4

The fourth type of organization is represented by a group or committee organization for the chief executive function. The "Type 4" plan can be found in some very small school systems. The board of education is both the policy-making and the policy-executing body. Line of authority flows directly from the board to the school principals and even the teachers. The various central office department functions of a large system are often vested in committees of the board, but the direct line of authority is from the board of education to the school building.

SAN DIEGO UNIFIED SCHOOL DISTRICT
MANAGEMENT AND GOVERNANCE

The management and governance structure of the San Diego schools is illustrated in Figure 1 on the following page. This structure is a variation of the "Type 3" plan as described by Allen.[4]

The Board of Education represents the policy-making body and the Superintendent performs policy-executing functions. This plan allows the Superintendent to supervise two major positions, the Deputy Superintendent for Administration and the Deputy Superintendent for Operations.

In addition, the Superintendent maintains under his direct jurisdiction some offices necessary to assist him in the functions retained in his office. Included are the offices for Legislative Liaison, Urban Affairs, Public Information, Systems and Procedures, and Legal Services.

A review of Figure 1 will clearly show the areas under the jurisdiction of the two Deputy Superintendents. All services described earlier in this document as INSTRUCTIONAL SERVICES are the responsibility of the Deputy Superintendent for Operations. The Security Department and Instructional Supplies, both SUPPORT SERVICES, are also his responsibility.. All other support services and some GENERAL SERVICES, including Finance, Personnel, Employee Relations, and Facilities Planning, are under the jurisdiction of the Deputy Superintendent for Administration, who also serves as Chief Executive Officer in the absence of the Superintendent.*

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[4] Ibid.

*See Chapter 1 for details regarding INSTRUCTIONAL SERVICES, SUPPORT SERVICES, and GENERAL SERVICES.

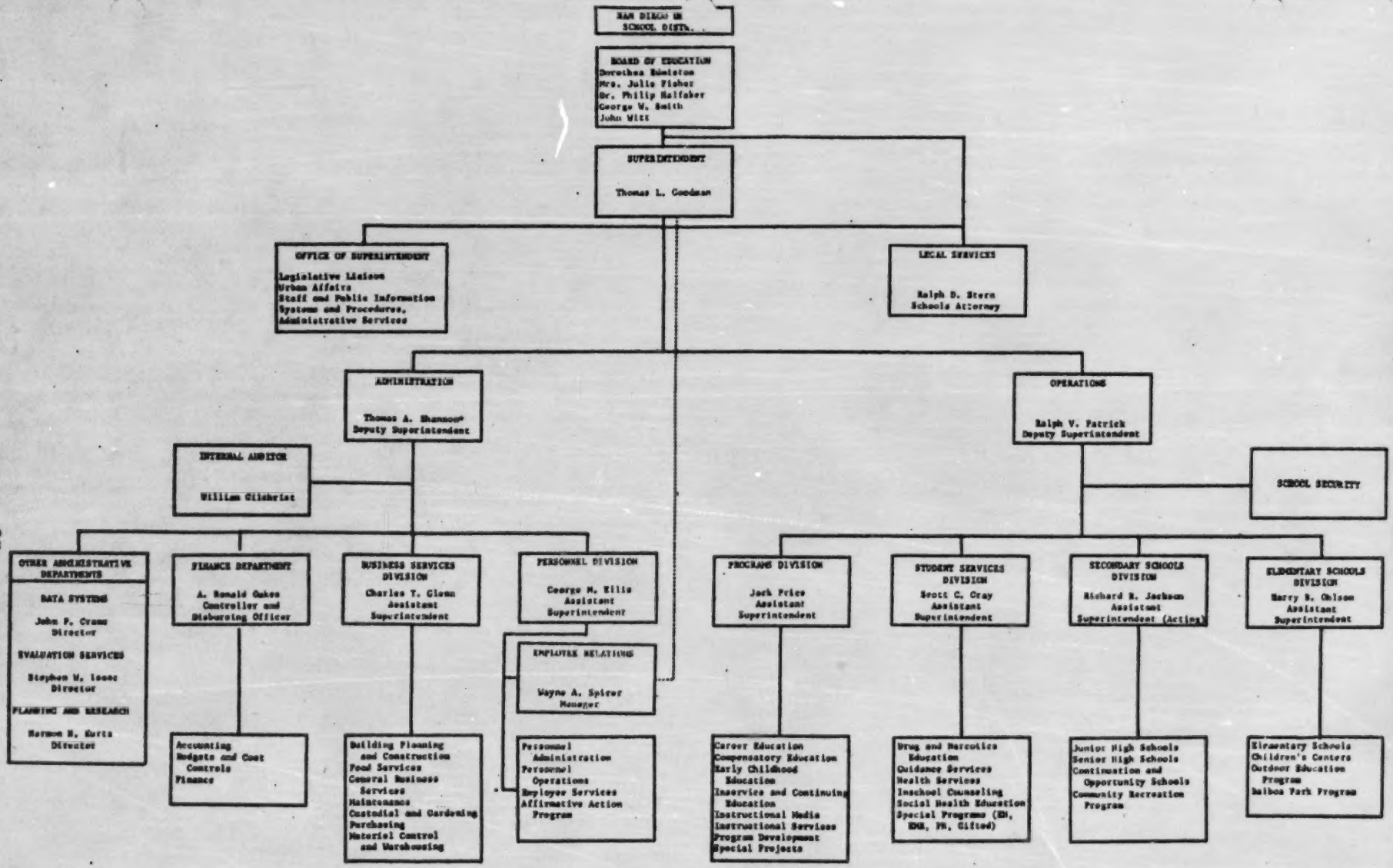

Figure 1

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Although the organizational structure in the San Diego schools is illustrative of the "Type 3" plan, it does incorporate the concept of group or committee organization for the chief executive function ("Type 4" plan). Peter Drucker, in the Practice of Management[5], states that the top management task is so immense in scope that it exceeds the capability of a single person. A well-managed organization requires a team of executives, in which each individual has an area of expertise and an assigned role for achieving the goals of the organization. The area of expertise and the assigned role must both be clearly defined.[6]

This is in effect what San Diego has in its Executive Council. In Executive Council, each major functional area is represented by the administrator who has the highest level of responsibility within the given functional area. Individuals offer their expertise to other members and draw from them their judgement and knowledge within specific areas. This is then coordinated by the Superintendent. In San Diego, the purpose of Executive Council is to maintain top level communications on districtwide policy matters and serve as a review board when group judgement and experience are either desirable or necessary to the decision-making process.

A review of Appendix B will familiarize the reader with the organizational structure below the Deputy Superintendent level.

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[5]Peter F. Drucker, The Practice of Management (New York: Harper Brothers, 1954), p. 138.

[6]"Structuring the Administrative Organization of Local Schools," p. 9.

PRODUCT LINE AND FUNCTIONAL STRUCTURES

Organizational structure can also be defined in terms of a product line structure or a functional structure. In a product line structure, one person is in charge of all activities. There are two major advantages. Operations and decisions can usually be handled quickly and accountability is vested in one individual. Such a system, however, is expensive and, as in the "Type 1" plan, there are heavy burdens placed on one individual.

In an organization designed on a functional basis, one individual does not attempt to carry full responsibility of the system. Instead, one contracts out responsibilities for various operations.

Most school systems represent a combination of both the product line and the functional structure. San Diego is predominantly organized on a functional basis.

BASIC ELEMENTS OF AN ORGANIZATION

The basic elements of an organization are as follows:

1. Structure
2. People
3. Systems
4. Organizational Dynamics

1. Structure. Basically there is no ideal structure except the one-man operation. An organization of any substantial size needs formal management techniques. Generally when a school enrollment reaches approximately 30,000, a formal system is required. With an enrollment of over 122,000, San Diego requires a very formal and highly structured organization, which it has.

2. People. All individuals have strengths and weaknesses, and it is not always possible to achieve the ideal. Therefore, in an organization, efforts must be made in areas of Structure and Systems (Nos. 1 and 3) to compensate for any limitations or weaknesses in people.

3. Systems. Several factors are involved in the element of Systems:

a. The Committee, Council, and Conference Structure. This has a significant impact on organizational effectiveness. In San Diego, Executive Council functions to maintain top-level communication on districtwide policy matters and serve as a review board when group judgement and experience are desirable or necessary to the decision-making process. The Council meets regularly once a week. Members include the Superintendent, the Deputy Superintendents, and top level administrators in all functional areas. A similar structure exists for divisions, departments, and schools.

b. Policies and Procedures. Policies are the principles which must be adhered to in the accomplishment of tasks. These are clearly defined in San Diego. See Appendix A, "1976 Policy Statement Governing the Legislative and Executive Governmental Branch Advocacy and Information Program of the San Diego Unified School District," and "Policies of the Board of Education--San Diego Unified School District."

Procedures represent the manner in which tasks are to be accomplished. A four-volume set of procedures manuals include complete, up-to-date information on all district activities. Details in-include a description of how tasks are to be accomplished. Approximately 600 sets are in use, plus a large supplementary

distribution for those not needing complete sets. For a sample, See Appendix C, Administrative Regulations and Procedures.

c. Communications. In San Diego several systems of communications operate. There are committees, conferences, reports, brochures, memos, informal meetings and gatherings, etc. In addition, the Public Information Office coordinates, organizes, and conducts districtwide information programs on all school activities, programs, and issues.

d. Controls. Controls involve required reports, feedback from operations, management processes, and decision-making procedures. In San Diego, controls are defined in various places such as policy statements, Procedures Manuals, job descriptions, special project guidelines, state and federal laws, etc.

e. Relative Roles. Responsibility and authority must be defined for relative roles of positions, divisions, departments, and schools in order to provide for smooth operation and orderly change. In San Diego, these roles are clearly defined in job description publications maintained by the Personnel Department. For a sample, see Appendix C, "Job Descriptions."

4. Organizational Dynamics. This is essentially the interaction of 1,2,3--Structure, People, and Systems. Factors which affect this interaction naturally involve personality factors, individual strengths and weaknesses, individual goals, levels of motivation, and interest conflicts. Organizations operate by distributing authority and setting a stage for the exercise of power.[7]

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[7]Abraham Zaleznik "Power and Politics in Organizational Life," Harvard Business Review, (May-June, 1970), p. 48.

Distribution of authority, exercise of power, power relations, and competition for power, naturally then, are also major factors in organizational dynamics.

With these factors in mind, it should be pointed out that a main objective in an organization is to bring talented individuals into location for the legitimate uses of power.[8] San Diego has a strong team of highly efficient and capable leaders in key positions. Their record of accomplishment of district goals and objectives testifies to this fact.

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[8]Ibid., p. 57.

FACTORS CAUSING CHANGE

Growth, Contraction, Additional Programs

As San Diego experienced growth in its enrollment, it was inevitable that changes would occur. In 1961, the Board of Education asked the Superintendent to delegate more authority. The Board found that its policy-making function was growing more complex with growth and thus requested that the Superintendent devote more time to Board members. At this time, the district had been organized on the basis of a product line structure.

A committee of three people was assigned the task of assessing the existing organizational structure and designing a structure based on a functional organization with appropriate divisions and departments. A key objective was to design a plan which could absorb growth and contraction without requiring major reorganization. Such a plan would then provide for a stabilized top management team.

Major divisions were defined as noted below.

ELEMENTARY DIVISION	SECONDARY DIVISION	POST HIGH DIVISION	STUDENT SERVICES DIVISION	PROGRAMS DIVISION	PERSONNEL DIVISION	BUSINESS SERVICES DIVISION

These divisions have remained stable since that time with the exception of the Post High Division. After 1972 the Community Colleges (Post High Division) were no longer part of the San Diego Unified School District.

In the years that followed 1961, growth was handled by adding more departments below the division level, thus keeping the top level of management stable. There was growth in enrollment as well as the addition of many

new programs. Some programs were added by choice or because of need; some were mandated by law. Examples of new programs included: Career Education, Bilingual-Bicultural Education, Special Projects, Early Childhood Education, Affirmative Action Programs, Occupation, Safety, and Health Programs, etc.

Numerous new or expanded programs resulted from legislation, such as:

1. Community Mental Health Act of 1963
2. Title II of the Economic Opportunity Act of 1964
3. Titles I, II, and III of the Elementary and Secondary Education Act of 1965
4. The State Preschool Act
5. Early Childhood Education (Senate Bill 1302)
6. Education of Disadvantaged Youth Program (Senate Bill 90)
7. Bilingual Education Act (Assembly Bill 2248)
8. Civil Rights Act of 1964

Presently, the district is experiencing a decline in enrollment, but the top level management remains essentially the same. There is still a chief executive, a chief operating officer, a chief staff officer, and six major divisions.

Thus, the original design was effectively planned and implemented. It absorbed rapid growth effectively and with stability. And now it is handling contraction effectively and still with stability in its management.

External Pressures

External pressures represent another factor which have caused modification. Many school distrcits felt the pressure to decentralize, that is, allow for more decision-making authority at the site level, in the mid 1960s.

In the United States, the first expressions of the decentralization

movement began in the 1950s. Advocacy planning called attention to special needs of ghetto children in the cities and provided a rationale for a new kind of relationship between professional and lay citizens. In the mid 1950s, the Federal Urban Renewal program required formation of community/neighborhood groups which were to participate in the planning process. Earlier, citizen participation had been required in the 1949 Urban Renewal Act. This, however, was interpreted in most cities to mean "the creation of blue-ribbon citywide panels interested mainly in downtown slum clearance."[8] A program promoted by the Ford Foundation and the Mobilization for Youth gave further impetus to the ideas of citizen participation and neighborhood government.[9]

In the mid 1960s came the major expansion in programs influenced by the concept of decentralization and greater citizen involvement. Citizens became involved in the education of their children by serving on an advisory council. Advisory council members represented residents of a particular target area.

Landmark legislation mandating citizen advisory council participation included: Community Mental Health Act of 1963; Title II of the Economic Opportunity Act of 1964; Titles I and II of the Elementary and Secondary Education Act of 1965; and the Demonstration Cities Act of 1966. Numerous programs and guidelines followed this legislation and by 1971, approximately 180 new federal programs had been initiated. All reflected the idea of "community participation."[10]

San Diego felt the pressure to decentralize in the late 1960s and in early 1970. The following document represents the district's thinking regarding decentralization.

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[8]George R. LaNoue and Bruce L. R. Smith. The Politics of School Decentralization, Lexington: D.C. Heath Co., p. 7.

[9]Ibid.

[10]Ibid.

ON DECENTRALIZATION OF DECISION-MAKING AUTHORITY AND RESOURCES

"The non-political objectives in decentralization of decision-making authority are as follows:

1. To promote diversity and innovation in educational approaches and programs responsible to local and individual students needs.
2. To delegate decision-making authority and resources to the lowest practical level.
3. To provide the mechanism and resources for involvement of staff and community in the decision-making process in their schools.
4. To provide flexibility in the areas of instructional programs and staffing.

The primary political objective is one of local control by the community or by vested interest groups in the community; various motives are involved. The primary methods for achieving the objectives are as follows:

1. Through regionalization--breaking a district into regions with regional administrations and, hopefully, with adequate support services.

2. Through changes in policies, regulations, and procedures without major changes in organizational structure.

Regionalization has not achieved either the non-political or the political objectives. A review of organization fundamentals will show that the result which regionalized districts are experiencing was predictable. One of the inevitable results is the increase in cost due to the establishment of regional administrations and the attempt to duplicate support services in each region. Districts start out by trying to regionalize without additions to staff, only to learn that they are more over-extended than before. The full effect of increased costs is not realized until the third or fourth year. The real problem is that they are still off-site costs. The emphasis should be placed first on decentralization of decision-making authority and resources to the school level, keeping a predominantly functional central administration which is more effective. Also, the district gets more for each dollar spent on administration. Guidelines are necessary to define the functions and the limits within which the principal can work in making decisions and spending funds. The guidelines would reflect legal and policy requirements.

This district has been an advocate of achieving the objectives of decentralization through changes in policies, administrative regulations, and procedures; i.e., decentralization to the school level first. This provides for more immediate or more rapid achievement of objectives. It is a relatively simple matter to say to the principal, "you now will make the decisions in these specific areas, and here are the resources to

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San Diego Unified School District. "On Decentralization of Decision-Making Authority." District report, Jan. 22, 1975.

enable you to carry them out." Both are necessary, the authority, including responsibility and the resources. State and federally funded categorical aid projects, particularly Title I and Early Childhood Education are demonstrating the validity and effectiveness of this approach.

In brief, this is what is occurring: sixty of the district's schools are involved in comprehensive individual school student needs assessments; project regulations mandate staff, parent, and citizen involvement; the school develops its goals and objectives, prepares a budget, gets the plan approved, implements it, and measures individual student progress toward meeting each of the objectives established.... There is a high degree of decentralization of decision-making authority and necessary resources through project funding, without regionalizing. In addition, considerable progress is being made in individualizing instruction and in achieving school and classroom-level accountability for education. The individualization of instruction, while a major objective of the district for years, received a major boost ... through special project regulations mandating it and funding it.

Prior efforts of the district in decentralization and innovation were being made through "School Pilot Studies," "Teacher Initiated Projects," "Curriculum Experiments", the "Elementary School of Tomorrow" experiments, school discretionary funds, a copyright and patent procedure, and through "pushing" the decision-making to the lowest level possible with each revision of a district administrative regulation and procedure.

The major caution in decentralization of decision-making authority and resources, by any method, is that an evaluation and "feedback" system must accompany it. This is necessary so that the process can be monitored and the end results evaluated to determine what is happening and whether the desired objectives are being achieved. Actually, from a Board of Education and general administrative standpoint, a decentralized operation requires better systems and controls than a centralized one."

Internal Factors

One of the major divisions in the San Diego organizational structure is the Programs Division* Its functions are designed to facilitate change. Innovative directors, specialists, consultants, and resource personnel are continuously working with district staff to explore, develop, implement, and evaluate new ideas, new programs, new strategies and techniques, and new materials. In the opinion of district administrators, San Diego is a school system which has made more changes and has responded to more changes than any other urban city school district in the nation.

*For a description, see Chapter 1, page 7.

ISSUES

Finances

With an organizational plan designed on a functional basis, the district is able to get the most for its administrative dollar. From this point of view, management and governance is effective as it relates to finance. There are, however, definite issues and problems related to district finances. These will be treated in Chapter 3.

Collective Bargaining

The Rodda Act (Senate Bill 160) was enacted into law during the 1975 session of the state legislature. This law governs employer-employee relations in public school districts in California and provides for the establishment of bargaining units. A bargaining unit is a group of employees with related job functions whose terms and conditions of employment, including wages, hours, benefits, grievances, etc., will be negotiated into binding agreements with the Board of Education for periods of at least one year.

The law which becomes effective July 1, 1976 raises many issues which must be dealt with from a management and governance point of view.

1. It could cost taxpayers millions of dollars to run the state agency established to supervise collective bargaining in California.

2. Additional time will need to be devoted by the Board of Education to negotiating with bargaining representatives.

3. Confrontations may result among teachers and administrators and among teachers themselves. One issue which must be resolved is exactly what items are subject to collective bargaining and exactly how much influence the teachers will have in controlling classroom-related activities and programs.

4. The administration must effectively deal with both teacher power and parent power, as these two may collide. Currently there are two major educational trends in California. The new law exemplifies the first, a greater voice for teachers. The second trend is toward a greater voice for parents and other citizens in how local schools are run, what they teach, and how they teach it.

4. (continued)

In both cases, the Board of Education, the Superintendent, the Deputy Superintendents, and school principals may be faced with having to give up a good deal of their authority to make way for the rising influence of teachers and parents.

Legislation and Permissive Taxes

The district has been successful in getting additional local taxation approval and legislation changed in order to provide needed funds for its building programs. One example is passage of a permissive tax for PROPOSITION XX and YY.

When bond issues to finance the construction and acquisition of facilities failed to pass by a two-thirds citizen vote the district was able to change legislation to permit passage of a state law to implement the lease-purchase building program. The new law required only a simple majority vote.

In 1974, San Diego was successful in getting Propositions XX and YY passed, authorizing certain expenditures for new school construction and for improvement of existing schools, respectively. In 1975-76, permissive taxes added $1.01 to the tax rate of the school district.

Long Range Planning

The district is committed to recognizing problems at an early stage and has established a long range planning program to effectively meet such problems. The following information from a recent district document, "Long Term Financial Plan," Nov. 26, 1975, represents the rationale for planning.

Expenditures are increasing at a more rapid rate than that provided for in Senate Bill 90.* In addition, school enrollments are projected to decline during the next several years, thus reducing the number of pupils and revenue under SB 90. Coupled with these changes is the need to initiate new programs and provide for new educational needs. Because of the revenue

*Senate Bill 90 is presented in Chapter 3.

ceiling established by SB 90, any changes that will result in additional costs must be compensated for through reductions in existing programs or services.

Good administrative practice requires that all existing programs and services be carefully reviewed to determine how the anticipated changes in revenue and expenditures can be accomplished in a manner that will be compatible with the goal of providing the best possible educational program.

Sound planning can reduce the difficulties that may accompany change by providing necessary lead time: (1) for citizen, staff, and student input; (2) for decision-making at the Board of Education level so that there is general community acceptance of the changes that will be required; and (3) to ensure that attrition can be utilized to achieve balanced reductions in staffing proportional to declines in enrollment, thus averting resultant large-scale layoffs and adverse impact on morale and productivity.

The planning process includes information gathering, staff and community input, and the formation of recommendations, and is designed to be accomplished by four task forces. The purpose of each task force is to (1) articulate all dimensions of the specific problem area; and (2) identify possible optional solutions to the specific assigned problem area and describe the pros and cons of such alternatives.

Task forces work in groups and individuals assigned give high priority to their responsibilities. Task forces include:

1. Revenue Task Force. The Revenue Task Force reviews Senate Bill 90, income, and regulations including what can be done to change this legislation. Areas of study include:

   - the fact that revenue ceiling established under SB 90 does not make adequate provisions for the indirect costs associated with changes mandated by the legislature and the courts or the changing demands placed upon schools;

   - the fact that state apportionment is based upon average daily attendance rather than upon the services needed by all of the pupils enrolled in the schools;

- increases in district contributions to the State Teachers Retirement System;
- unreimbursed federal mandates;
- special projects and programs that do not provide funding to cover all of their costs;
- state laws and regulations that make it difficult to fully utilize attrition to reduce staffing;
- inflation that increases at a rate exceeding that provided for in SB 90; and
- legislation that would provide a more equitable method of financing schools.

2. Programs Task Force. The Programs Task Force reviews the suggestions that have been made for reducing costs of programs and services and assigns them to the appropriate department or division for study. Areas of study include:

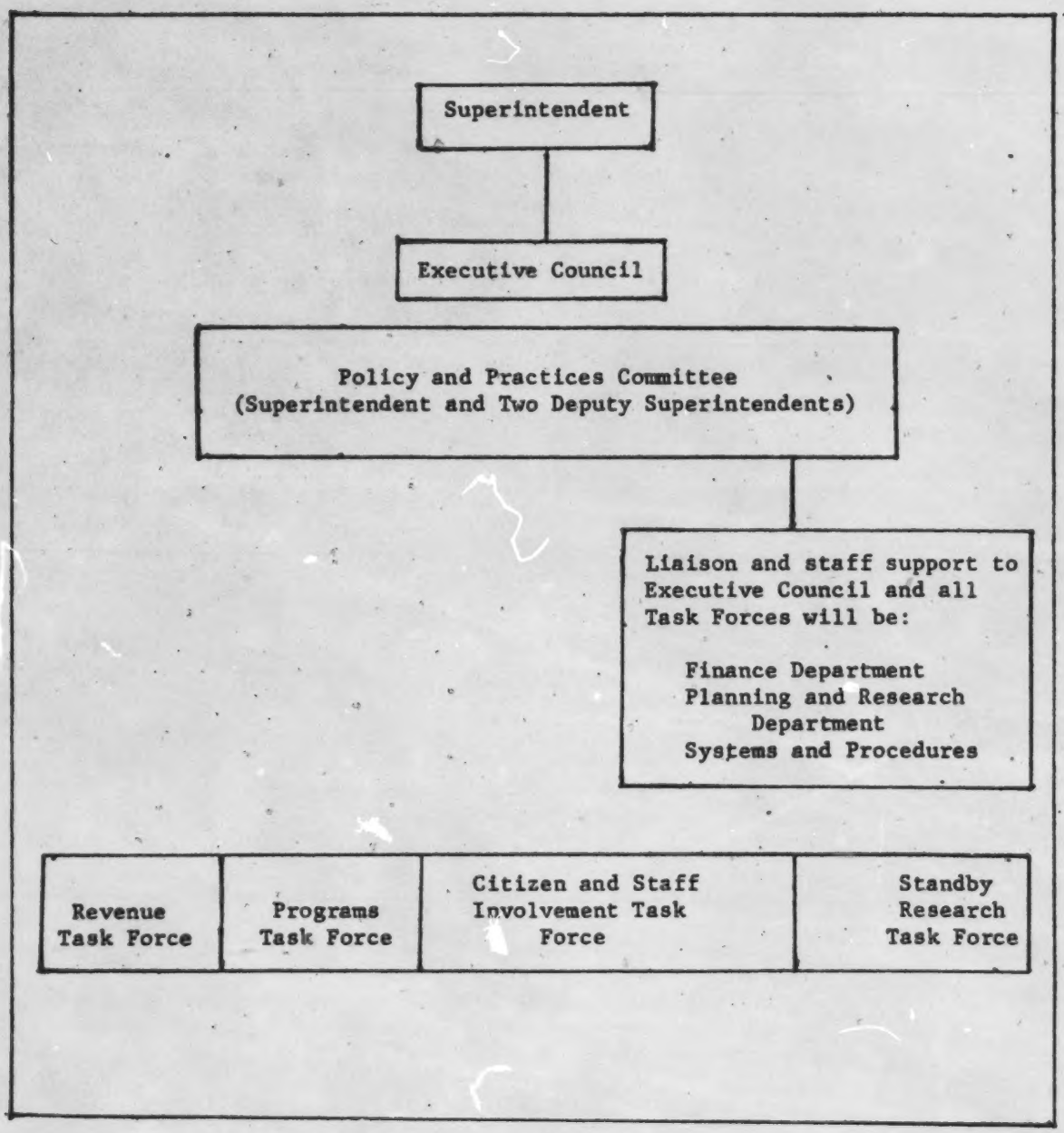
- the effect of declining enrollments upon administrative and support service staffing;
- the effect of annual enrollment decline versus staffing formulas based upon peak enrollments;
- the assumption that vacant positions will be filled automatically without an opportunity to consolidate duties with other functions or reduce services;
- the amount that salaries--including annual increases, fringe benefits, and increments--exceed the increase provided for in SB 90;
- the amount that district retirement costs exceed the increase provided for in SB 90;
- the impact of any reassignment of functions upon the district's administrative organization;
- the effect of declining enrollments upon staff utilization in the schools;
- increases in utilities costs that grow at a rate faster than general inflation;
- no provision for minimum class size in elective or experimental courses;
- expenditures for district compensatory education programs;
- costs of decentralizing decision-making, e.g., discretionary funds, etc.;

- budget categories where San Diego expenditures are above the state average;
- subsidization of athletic and extracurricular activities;
- administrative costs for summer school, e.g., summer school coordinators; and
- computer applications that improve services but do not reduce costs.

3. Citizen and Staff Involvement Task Force. The Citizen and Staff Involvement Task Force's area of work includes:
   - development of a plan to (1) involve citizens and staff in the planning process; and (2) inform the public, generally, about the decisions that must be made in the succeeding years; and
   - recommendation of the general composition of a Citizen's Finance Committee, e.g., delegates from Parent Teacher Associations and Citizen Advisory Committees, organizational representatives, etc.
4. Research Task Force. The Research Task Force's area of work includes:
   - providing research assistance to the other task forces.

Because the eventual solution will be districtwide in nature, the efforts of all task forces are coordinated by the Policy and Practices Committee, consisting of the Superintendent and the two Deputy Superintendents. After task force reports are approved by this committee, they are forwarded to Executive Council. Long-term planning is not in isolation from other districtwide planning activities. Planning recognizes the annual budget development schedule.... The district believes that time schedules should recognize that reductions in staff, programs, and services need to be scheduled over a five-year period; therefore, the schedule or time line...is designed to show:

1. specific recommendations for the 1976-77 budget...
2. a plan for arriving at decisions each year that will take into account annual changes in finance legislation and enrollment.


Superintendent
Executive Council
Policy and Practices Committee
(Superintendent and Two Deputy Superintendents)
Liaison and staff support to Executive Council and all Task Forces will be:
Finance Department
Planning and Research Department
Systems and Procedures
Revenue Task Force
Programs Task Force
Citizen and Staff Involvement Task Force
Standby Research Task Force

CHAPTER 3

DISTRICT FINANCES

CHAPTER 3

DISTRICT FINANCES

PUBLIC EDUCATION INCOME

During the 1975-76 school year $240,241,269 will be invested in the education of the children and youth of the city. The diagram below shows the various sources of public education income and the amounts received from those sources.

1975-76 Sources of Income

Federal Income

Federal income is received for many ongoing programs.

- Impact aid includes general aid funds received from the federal government to assist the school district in providing education for the children of parents who live on and/or work on federal property (PL 874). These funds are used to replace lost assessed valuations due to federal non-taxed property located within this district.

- Compensatory education programs include funds received from the federal government for a variety of programs directed toward improving the opportunities for educationally disadvantaged children and youth through the use of additional personnel and instructional resources.

- There are many other programs funded by federal sources (i.e. Vocational Education Act and Comprehensive Employment Training Act).

State Income

- State income includes general purpose apportionments under the provisions of SB 90 and special funded programs such as Early Childhood Education, Bilingual Education, and Special Education for Handicapped Children.

County Income

- County income includes miscellaneous income from sources such as trailer rentals, trailer coach fees, and highway rentals.

Local Income

Local income is the major source of the money invested in public education.

Local income consists of property taxes and non-tax income from local revenue.

- PROPERTY TAXES. These are taxes, secured and unsecured, as determined by the formulas of the Property Tax Relief Act of 1972 (SB 90) and the special purpose taxes provided by law and voted upon by the people.

- The provisions of the Property Tax Relief Act of 1972 (SB 90) specify a formula for determining the total revenue received from state apportionment and from local property taxes other than special purpose taxes. The formula applied

by this act is based upon ADA* expenditures in the base year 1972-73 plus inflation allowances since that date.

- o NON-TAX INCOME. Non-tax income includes revenue received from sources such as interest on cash balances, parent fees from children's centers, and cafeteria sales.

Other Income

Other income consists of income from beginning balances and from transfers between funds. Unexpended funds from the previous year result in a beginning balance for the current year.

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*ADA represents the number of students attending school in the district based upon average daily attendance. For 1975-76, the estimated ADA was 126,936. This estimation was based on average daily attendance during the regular school program and the summer school program.

RESTRICTIVE USE OF REVENUE

Revenue received by San Diego City Schools is budgeted into two major categories. These two major categories are referred to as General Purpose Revenue and Special Purpose Revenue. The diagram below shows the relationship of these two categories to the total revenue received.

General Purpose Revenue	$ 165,367,346
Special Purpose Revenue	74,873,923
Total 1975-76 Revenue	$ 240,241,269

General Purpose Revenue--$165,367,346.

General Purpose Revenue is utilized for the operation of the kindergarten through Grade 12 school program. School operation includes specific expenditures for items such as instructional materials, health services, teachers' salaries, libraries, counseling and guidance services, and transportation.

Income from General Purpose Revenue may be expended in any manner that the Board of Education directs, provided it does not conflict with the California Education Code.

Special Purpose Revenue--$74,873,923

Special Purpose Revenue is utilized for special purposes only. This money can be used only for specific purposes and in many instances has been approved by the voters of the district identifying how Special Purpose Revenue will be spent.

GENERAL PURPOSE REVENUE

General Purpose Revenue is utilized for the operation of the kindergarten through Grade 12 school program and may be expended for any purpose allowed under the California Education Code. Programs which use General Purpose Revenue are shown below.

GENERAL PURPOSE REVENUE

Instructional Programs
Instructional Support Programs
Pupil Services
Special Projects
General Support Programs
Auxiliary Programs
Other Outgo

These programs are further identified below, and the dollars expended for each are presented.

Instructional Programs--$92,634,834

Instructional Programs include all the direct instructional activities associated with general and special education, including teachers, services, and instructional materials.*

Instructional Support Programs--$19,071,261

Instructional Support Programs include program development, library support services, principals and vice principals, and evaluation services.* Also included are educational television, computer assistance in education, and the human relations program--a program designed to reduce internal friction.

*These are described in Chapter 1.

Pupil Services--$9,718,296

Other support services offered for pupil achievement and development include pupil attendance services, counseling and guidance services, and health services.*

Special Projects--$14,753,234

Special Projects pertain to all those special programs which are approved and funded by state and/or federal agencies.*

General Support Programs--$24,299,089

For the 1975-76 school year, $24,299,089 will be invested in all general support programs. This includes expenses for districtwide administration; transportation services; and school operation, maintenance, and warehouse services.

Auxiliary Programs--$1,544,876

An auxiliary program for facilities acquisition and construction helps to provide the modern educational facilities necessary to meet the needs of present-day educational programs. Currently the district is engaged in a long-range construction program to provide the necessary school facilities for its students.

Other Outgo--$3,345,756

Other Outgo includes reserves, tuition transfers, stores inventory, and school revolving cash funds.

RESERVES

The district maintains reserve funds for various needs which arise during the school year. Reserves are needed for the expenses of long-term illness, sick leave, equipment replacement, and fire loss deductible costs.

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*These are described in Chapter 1.

Teachers at site locations who wish to conduct approved pilot or experimental instructional projects may need additional funds for the expense of materials, equipment, and supplies. For this purpose, funds are maintained in the district budget for teacher-initiated projects.

A school discretionary fund is available to all schools. At individual sites the principal and the staff members determine how discretionary funds will be spent. These funds may be used for the expense of items such as additional instructional materials and equipment, special programs, events, and conferences.

TUITION
STORES INVENTORY
SCHOOLS REVOLVING CASH FUNDS

- TUITION. Tuition transfers are included to cover the cost of educating San Diego students attending special schools, other school districts, and certain state-supported correctional facilities.

- STORES INVENTORY. A year-end inventory must be provided for the stores warehouse.

- SCHOOL REVOLVING CASH FUND. Schools must have funds available for daily emergencies which arise during the year.

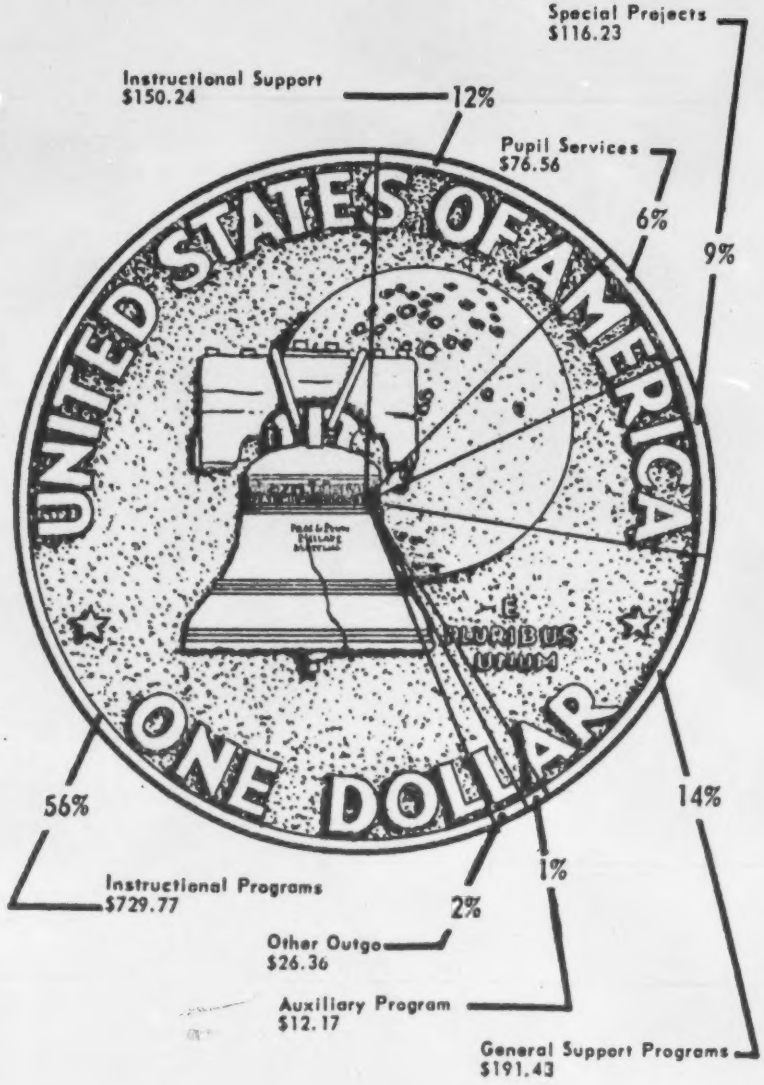
Summary

Following are two diagrams showing the allocation of General Purpose Revenues. The allocation of funds is shown for the district and individual students. The per student amounts presented in this document are based on average daily attendance (ADA). For 1975-76, the estimated ADA is 126,936 for the regular session and the summer school session.

Summary: Allocation of General Purpose Revenues

Total for District - $165,369,346

Total per Student - $1,302.76



SPECIAL PURPOSE REVIEW

Special Purpose Revenue dollars are restricted in their use. This money has been appropriated for very specific purposes, can be used only for those purposes, and in many instances has been approved by the voters of the district. An examination of the Special Purpose Revenue will give further information about the dollar investment in public education for San Diego City Schools. Programs which use this revenue are shown below.

Facilities Acquisition and Construction
Development Center for Handicapped Minors
Children's Centers
Food Services
Community Services
Debt Services
Bond Interest and Redemption
Retirement

These programs are further identified below, and the dollars expended for each are presented.

Facilities Acquisition and Construction--$41,363,803

Three major facilities construction programs are now in operation--Pre-Field Act Program, Proposition XX Five-Year Program, and Proposition YY Five-Year Program.

The Pre-Field Act provides for the replacement of buildings which do not meet earthquake safety standards and consequently must be abandoned by law. Provisions through this program are made for:

- Partial replacement of 11 elementary schools
- Complete replacement of 1 elementary school
- Partial replacement of 8 secondary schools
- Partial replacement of 1 athletic stadium

The Proposition XX Five-Year Program, now in its first year, provides for:

- 15 new elementary schools
- 1 new junior high school
- 2 new junior-senior high schools
- 3 new career center additions
- 1 new senior high school

The Proposition YY Five-Year Program, now in its first year, provides for expenses of:

- Intrusion alarms in all schools
- Land acquisition for schools needed in the future
- Planning and construction of additional Wright Brothers Career High School facilities
- Planning and construction of Midway Junior-Senior High School
- Equipment needed for new schools
- Maintenance of schools
- Removal of deficiencies at school sites

Development Center for Handicapped Minors--$806,414.

A development center for handicapped minors is provided for students who have multiple handicaps and are severely and profoundly mentally retarded. The needs of these children cannot be adequately met in the regular classroom or in the regular district special education Programs. Presently 130 students attend the Revere Development Center, where an individualized program is specifically designed to meet their needs.

Children's Centers--$6,419,944

Children's Centers have become a vital part of the educational system of San Diego City Schools. Throughout the city there are presently 30 different

children's centers where educational activities appropriate to various age levels are provided for the children of working or disabled parents. Centers enroll children of two age groups. The pre-school age group includes children from two to five years of age; the school age group includes children from Kindergarten through Grade 6.

Food Services--$10,284,406

As noted earlier, the expenses of managing the food services program are covered by the income derived from cafeteria sales and federal and state subsidies.*

In order to receive federal and state reimbursements the district must serve meals which meet the United States Department of Agriculture menu patterns as well as participate in the National School Lunch Program. Under the provisions of this program the district must serve free or reduced-price meals to needy children.

Since revenues from government subsidies and district cafeteria sales do not cover the entire cost of the food services program, the district must provide the dollars for any differences. A permissive tax over-ride provides the dollars needed for the Meals for Needy Children Program.

Community Services--$2,709,075

Community school recreation projects and programs are authorized by the Community Recreation Act. Under this act, improvements and new facilities such as the following are provided:

- Building tennis courts
- Building multipurpose recreation courts
- Building handball courts

*Additional information regarding Food Services is also presented in Chapter 1.

- Turfing playgrounds
- Building community swimming pools

The school district also cooperates closely with the city of San Diego in a unified program designed to provide recreation facilities for its citizens. The city has the primary responsibilities, but the school district provides supplemental funding.

Debt Services--$97,218

Debt services include monies needed for payment of state loans for the building program operated under the Pre-Field Act.

Bond Interest and Redemption--$10,729,018

Money from the bond interest and redemption fund is required to pay off the bonded indebtedness of the district.

Retirement--$2,464,045

Retirement funds are needed for district contribution to a state employee retirement system.

Summary

Following is a diagram showing the allocation of Special Purpose Revenue for the district. Per student amounts are not included here because the total pupil enrollment is not affected by these dollars.

Summary: Allocation of Special Purpose Revenues

Total for District - $74,873,923

Development Center for Handicapped Minors — 1%
$806,414

9% — Children's Centers
$6,419,944

14% — Food Services
$10,284,406

4% — Community Services
$2,709,075

Less than 1% — Debt Services
$97,218

14% — Bond Interest and Redemption
$10,729,018

3% — Retirement
$2,464,045

Facilities Acquisition and Construction — 55%
$41,363,803

CURRENT ISSUES AND CHANGING ASPECTS OF SCHOOL FINANCING

The district must address itself to current issues regarding finances for public education. Three major current issues are inflation, the slippage factor associated with Senate Bill 90 (SB 90), and equalization of revenue.

Inflation

The biggest hurdle confronting the district in its preparation of the 1975-76 school budget was inflation. The cost of almost everything needed by the district increased. In order to balance the budget with a five percent increase in salaries and with provision for inflationary increases in essential items such as utility services and insurance services, it was necessary to make a reduction of over two million dollars in all other items. The district handled this problem by making major reductions which would least affect the individual child and the individual classroom.

The Slippage Factor

Under the provisions of SB 90, dollars are contributed to public education from state apportionments and from local property taxes. The provisions specify that the state will pay the district a number of dollars per ADA less a specific tax rate but no less than $125 per ADA. The remaining revenue is then contributed by the local taxpayer.

The amount received from the state fluctuates due to changing numbers of students in attendance and to increases in the local property assessed valuation. This change in state contributions, normally a decrease, is known as the slippage factor. The slippage factor is of particular concern to the district because as assessed valuation on local property increases, the amount contributed by the state decreases. Thus a heavier burden is placed on the local taxpayer.

Equalization of Revenue

The California Supreme Court is presently considering the constitutionality of present finance methods for public education. This historic case is known as Serrano v. Priest. The basic premise of the case is whether California's method of financing schools allows children an equal educational opportunity that is independent of the ability of a district to finance the education. The decision of the court will have an impact on the future financing of public education.

The district publication "Education and your Dollar Investment" is the source of information appearing in Chapter 2.

DISTRICT FINANCIAL PLANNING, 1976-80

The district is currently facing critical financial decisions which continuously must be made if the school district is to continue to provide and improve the educational program.

As described earlier in this chapter, the total budget for 1975-76 is more than $240 million. However, only $165.3 million (General Purpose Revenue) can be used for general operating expenses. The rest of the budget, $74.8 million (Special Purpose Revenue) can be spent only on specific programs, many of which have been voter approved.

The significant income figure in developing the next budget for 1976-77 is the amount that can be anticipated for general operating expenses. Under the limit placed on district income under Senate Bill 90, a state law, the district is anticipating an increase of only $2.2 million in income for general operating purposes next year. This $2.2 million is not enough to meet the costs of operating with the 1975-76 level of programs and service. This is very clearly a major financial problem which the district faces.

The district is anticipating further decreases in enrollment; however, even with staffing adjustments, salary increments, and reclassifications, approximately $3.3 million must be added to the 1976-77 budget. Employee benefits--including certificated and classified retirement contributions of the district, medical and dental insurance, workermens compensation, and other benefits--will go up more than $2.6 million. Utility bills are expected to be $0.8 million more next year. All these cost increases, plus inflationary impact on many supplies and services, although offset by reductions in other areas, amount to a net of $3.7 million more than the estimated income in 1976-77.

In projecting a balanced budget for 1976-77 on the basis of continuing...not improving...just continuing the educational program within an income reflecting reduced enrollment and staffing, the district must reduce appropriation requests by approximately $3.8 million. During 1975-76, the district cut its staff by 145 positions and expenditures by $2.5 million to balance its budget. Any similar reduction in personnel and educational programs in 1976-77 would not be in the best interests of students or the staff.

In forecasting income and appropriations over the 1977-1980 fiscal years, the district anticipates a continuing gap of between $2 million to $4 million each year. And that, presently, is a very conservative estimate.

The district must, of course, explore ways of handling this current and continuing problem. Options to help meet financial needs include:

1. A revenue limit increase election. Such a proposal, placed on June 8, 1976 ballot, would allow the district to increase its revenue limit per pupil (ADA) up to $75. Currently, it is much lower. Additional income would be generated by an increase in the local tax rate, if approved by the voters.

   Income from the increased revenue limit would permit the district to meet the anticipated deficit for the next year; provide for an equitable salary increase for employees (comparable to increases in the public and private sector); provide additional funding for books, educational supplies, and equipment; and make inroads on revenue deficits anticipated immediately beyond the next fiscal year.

2. State legislature approval of a new law, Assembly Bill 2009, which would fund local district contributions to the State Teachers' Retirement System through a countywide tax. Passage of AB 2009 would reduce the district's 1976-77 revenue gap by $1.5 million.

3. State legislature approval of an increase of the inflation factor under SB 90 from the present 5.8% to a more realistic percentage and full state funding of the excess costs of special education programs.

4. Staff and community review of existing district educational programs and services to be reduced or eliminated.

Presently, the revenue limit increase and a thorough review of all educational programs are two major areas in which the district is participating actively. The Board of Education has declared its intent to place a revenue limit increase proposition on the June 8, 1976 election ballot and special task forces are developing options to reduce expenditures. These task forces, presented in Chapter 2, include the Revenue Task Force, the Programs Task Force, the Citizen and Staff Involvement Task Force, and the Research Task Force. They are exploring various ways expenditures might be reduced and the impact of such reductions. In addition, the district is continuing its efforts to urge legislative approval of the remaining options.

The realities of present day school financing dictate a careful concern for the district's educational programs. Questions are being asked, options are being identified, and comparisons are being made regarding the decisions that must be made about spending an increasingly limited amount of money. Such a task means a team effort and that team effort means the local, state, and federal government, the public citizens, the Board of Education, the district administration, and the district staff--all working cooperatively for a sound educational program designed to meet the needs of children and youth of the city.

Information appearing in Chapter 2, is based on a Superintendent's report, "District Financial Planning, 1976-1980," distributed to all staff members on March 5, 1976.

APPENDIX A

DISTRICT DOCUMENTS

POLICIES OF THE BOARD OF EDUCATION
SAN DIEGO UNIFIED SCHOOL DISTRICT

Adopted by the Board of Education
December 30, 1975

1001. OFFICERS

The officers of the Board of Education shall be: President, Vice President, Secretary, and Assistant Secretary.

1002. ELECTION OF OFFICERS

The President and the Vice President of the Board of Education shall be elected from the members of the Board by roll call vote of the members at the Board's annual meeting held at a public meeting of the Board of Education between December 15 and January 14 of each year, or as soon thereafter as may be practicable. The President and the Vice President shall each receive the votes of a majority of the full membership of the Board before being declared elected.

1003. TERM OF OFFICE

The President and Vice President, respectively, shall hold their offices for one year during the period January 15 next to the following January 14 and until their successors shall be duly elected and qualified.

1004. VACANCY IN OFFICE

In the event of a vacancy in the office of President or Vice President by death, resignation, or otherwise, the Board of Education shall immediately elect a successor to the President or Vice President, as the case may be, to fill the vacancy for the remainder of the normal term of the office and until a successor shall be duly elected and qualified.

1005. PRESIDING OFFICER

The President shall preside at all meetings of the Board of Education at which he is present. He shall perform such duties and exercise such powers as usually pertain to the office of President, and he shall also have such additional powers as may be granted to him by law or by the Board.

1006. PRESIDING OFFICER IN ABSENCE OF PRESIDENT

The Vice President shall preside at all meetings of the Board of Education in the absence of the President, and he

shall perform such other duties as may be enjoined upon him by the Board. In the case of absence of the President or if there be a vacancy in the office of the President, all the powers and duties of that office shall devolve upon the Vice President, who shall continue to exercise such powers and duties until the President returns or the vacancy is filled.

1007. PRESIDING OFFICER IN ABSENCE OF PRESIDENT AND VICE PRESIDENT

In case of the absence, disability, or refusal to act of the President and the Vice President at any meeting of the Board of Education when a quorum is present, as determined by the Secretary by roll call, the members present may elect by majority vote of the members voting a Chairman Pro Tem for that meeting.

1008. QUORUM AND ORDER OF BUSINESS

At each meeting of the Board of Education, the President shall take the chair at, or as close as practicable after the time appointed for the meeting and shall call the meeting to order. A quorum for the transaction of business shall consist of a majority of the full membership of the Board. If no quorum be present, the meeting shall be adjourned in accordance with California law. When a quorum is present, the order of business at a regular meeting shall be as follows:

A. PLEDGE OF ALLEGIANCE

B. INVOCATION (as appropriate for special occasions)

C. SUPERINTENDENT'S SPECIAL REPORT

D. APPROVAL OF MINUTES

E. ADOPTION OF CONSENT CALENDAR

F. REPORT ON COMMUNICATIONS

G. REPORT ON LEGAL MATTERS

H. REPORT OF THE SUPERINTENDENT--General

I. REPORT OF THE SUPERINTENDENT--Operations
   1. Elementary
   2. Secondary
   3. Student Services
   4. Programs
   5. Compensatory Education

J. REPORT OF THE SUPERINTENDENT--Administration
   1. Personnel

K. REPORT OF THE SUPERINTENDENT--Administration
   1. Business--Buildings and Grounds
   2. Business--Equipment and Supplies
   3. Business--Miscellaneous
   4. Finance

L. PUBLIC HEARINGS ON NEW MATTERS

M. POLICY FOR DETERMINING THE AVAILABILITY OF SCHOOLS

N. BOARD MEMBERS' REPORTS

O. ADJOURNMENT

1009. SUSPENSION OF ORDER OF BUSINESS

This order of business may be suspended or changed at any time during any meeting of the Board of Education by a majority vote of the members voting, and shall be suspended and changed at any meeting of the Board at which opening of bids is scheduled in order to permit opening of bids immediately following the Invocation.

1010. ACTION BY THE BOARD OF EDUCATION

The Board of Education may take action on matters properly before it only in public at a regular or special meeting, except in those instances where action is permitted by law in executive session. The authority of the Board may only be exercised as a Board and only at such meetings or executive sessions as duly and legally constituted. Individual members acting in their individual capacities have no authority to commit the Board or Superintendent to any policy determination or course of action.

1011. ITEMS PRESENTED BY BOARD MEMBERS FOR IMMEDIATE ACTION

Members of the Board of Education who desire to introduce an item for immediate action at the public Board meeting at which that item is first considered should file such item for inclusion in the agenda with the Office of Administrative Services by 3:30 p.m. on the Wednesday preceding the regular Tuesday Unified School District Board meeting. When Board meetings are held on days other than Tuesday, special arrangements for inclusion in the agenda of such Board member "immediate action" items should be made with the Office of Administrative Services.

1012. ROLE OF BOARD OF EDUCATION IN ESTABLISHING POLICY

The Board of Education, under the law, is charged with the responsibility of setting policy for the San Diego Unified School District. In order to carry out that responsibility the Board employs a Superintendent of

Schools as its Chief Executive Officer and as the Chief Administrative Officer of the San Diego Unified School District. In carrying out these responsibilities, the Superintendent is accountable to the Board of Education. This accountability requires that the Superintendent be kept advised of problems and that the Superintendent have the authority to control the utilization of the staff of the District. It is, therefore, the policy of the Board of Education that:

A. The Board and its members shall deal with the administration of the school district through the Superintendent or his designated representative and not through subordinate administrators except that nothing shall preclude a Board Member from making a factual inquiry which does not involve either administrative action or the compilation of information not already available;

B. No Board Member shall request from the Superintendent the preparation of a report or compilation of material not readily available and involving significant staff time unless the Board of Education by motion duly made and adopted shall have approved the preparation of the report or the compilation of material;

C. Members of the Board of Education shall refer all personal appeals, applications, complaints, and other communications concerning the administration of the school district to the Superintendent for investigation and report to the Board member except when such matters may come before the Board at a meeting on appeal from decisions of the Superintendent.

1013. PARLIAMENTARY PROCEDURE

The rules of parliamentary law embraced in Robert's RULES OF ORDER (Revised) shall serve as a guide in public meetings of the Board of Education in all cases in which such rules are not inconsistent with these policies of the Board.

The presiding officer is authorized to order a meeting of the Board of Education adjourned at any time if the legislative decorum of the meeting is disrupted by members of the audience and the audience does not observe a request by the presiding officer for restoration of order.

All orders and rulings by the presiding officer of the Board at any meeting of the Board shall be final except

where a member of the Board appeals an order or ruling by motion and such motion is approved by a majority of the full membership constituting the Board. An appeal motion may be made only immediately after the order or ruling being appealed has been made. The Schools Attorney shall act as parliamentary law advisor at all meetings of the Board.

1014. AMENDMENT OF POLICIES

The policies of the Board of Education may be repealed, amended, or added to only at a regular meeting and by a majority vote of the full membership constituting the Board. Any and all amendments to these policies shall specify therein the chapter and section thereof sought to be amended.

1015. SUPERINTENDENT AS OFFICER OF BOARD

The Superintendent of Schools shall be the Chief Executive Officer and permanent Secretary of the Board of Education, ex officio, in accordance with California law. He shall prepare agendas for all meetings of the Board and conduct official correspondence for the Board.

1016. SCHOOLS ATTORNEY

The Schools Attorney shall be an attorney admitted to the practice of law in the State of California and shall provide legal counsel and representation to the full extent provided by Education Code Section 945.1 for the Board of Education and the Superintendent. He shall attend all meetings of the Board of Education. Under direction of the Secretary, the Schools Attorney also shall be Assistant Secretary of the Board and prepare notices for all meetings of the Board of Education, supervise the recordation of the minutes of such meetings, be the custodian of the official minutes of the Board of Education, certify to the authenticity of the minutes, or portions thereof, of meetings of the Board, and conduct correspondence for the Board as requested by the Board Secretary or as required in the exercise of his responsibilities as Schools Attorney.

1017. REGULAR MEETINGS

Regular meetings of the Board of Education shall be open to the public and shall be held in the Board Room, auditorium, Education Center, 4100 Normal Street, San Diego, California, or at such other places, or times, within the district as the Board shall designate, on Tuesday of each week at 2:00 p.m. unless a Tuesday falls on a legal or Board declared holiday, in which event the meeting shall be deemed cancelled unless rescheduled for the Monday preceding or the Wednesday following the holiday.

Regular meetings may be adjourned to a subsequent time or day at the discretion of the Board should it appear to the Board that the business of the meeting has not been completed. Each verified employee organization shall be entitled to appoint one of its members to attend regular meetings of the Board who shall be relieved of his normal duties of employment with the school district in sufficient time to attend the meeting. Such employee shall suffer no loss of pay in attending Board meetings pursuant to this section.

1018. SPECIAL MEETINGS

Special meetings of the Board of Education shall be open to the public and may be called at any time and at any place designated in the notice and call of the special meeting in accordance with California law. Each verified employee organization shall be entitled to appoint one of its members to attend special meetings of the Board who shall be relieved of his normal duties of employment with the school district in sufficient time to attend the meeting. Such employee shall suffer no loss of pay in attending Board meetings pursuant to this section.

1019. ANNUAL CONSIDERATION OF BOARD POLICIES

At the annual organizational meeting of the Board of Education, the Secretary shall present to the Board of Education for readoption these policies which are then in effect, and such policies shall be considered, along with any proposed amendments thereto, for approval by a majority vote of the full membership.

1020. VOTING

The Superintendent shall be afforded the opportunity to make known his recommendation, if any, on all matters pending before the Board of Education prior to the time the presiding officer calls for the vote. Except as otherwise provided by law or these policies, all matters pending before the Board shall be decided by a majority vote of the full membership constituting the Board. The Ayes and Nays shall be taken and entered of record. Abstentions shall be recorded as abstentions but counted as Nays in determining the passage or failure of a motion or resolution.

1021. WRITTEN COMMUNICATIONS TO THE BOARD

All written communications addressed to the Board of Education involving policy matters which are properly the first concern of the Board shall be placed on the public agenda of the meeting of the Board held next after receipt of the written communications by the Board. If a written communication challenges the personal capacity of an employee to render service to the Board, involves a school district matter being litigated in the courts, or concerns the reputation of a pupil or former pupil of this school district, it shall not be placed on the public agenda. Instead, such communication shall be offered for private consideration of the Board at an executive session which shall be held following the meeting of the Board next after receipt of the written communication by the Board. The Secretary may establish in advance deadline times prior to a meeting, at which communications to be considered at that meeting, or following that meeting in "executive session," must be submitted.

1022. PUBLIC HEARINGS AT MEETINGS OF BOARD OF EDUCATION

There shall be two types of public hearings conducted by the Board of Education at its regular public meetings, as follows:

A. Agenda Hearing--Any person who desires to be heard by the Board on an item listed on the agenda shall come forward before or during the meeting and register a request for an "Agenda Hearing" with the Schools Attorney. A person making such request may express his opinion publicly to the Board about an agenda item at that point in the agenda immediately prior to the time which the Board considers such agenda item. In the interests of expediting the consideration of other business before the Board, the Board may act to defer consideration of the item which is the subject of the agenda hearing and the agenda hearing itself to that point in the meeting immediately preceding public hearings on new matters. A person addressing the Board in

an agenda hearing shall confine his remarks exclusively to the agenda item about which he speaks and he shall not be permitted to participate in any legislative deliberations of the Board about the agenda item.

B. New Matters Hearing--Any person who desires to be heard by the Board on an item which is not listed on the agenda shall come forward before or during the meeting and register a request for a "new matters hearing" with the Schools Attorney. Persons requesting a new matters hearing shall be prepared to be heard by the Board upon conclusion of the Board's business meeting agenda through and including Section K, REPORT OF THE SUPERINTENDENT--ADMINISTRATION, or at 3:30 p.m. (8:30 p.m. for meetings commencing at 7:30 p.m.) whichever shall occur earlier. A person requesting a new matters hearing who desires to be listed on the agenda shall make such request prior to 2:00 p.m. on the Thursday preceding the regular Tuesday meeting of the Board. All requests for new matters hearings must be made prior to the time the public hearings on new matters commences. A person whose new matters hearing is listed on the agenda shall receive first priority in determining the order of new-matters-hearing speakers at the Board meeting.

The Board shall take no action other than an action of referral on any subject discussed in a new matters hearing at the same Board meeting in which the new matters hearing is heard unless the Board expressly declares an emergency to exist with reference to such subject.

All hearings shall be limited to five minutes unless this time limit is waived by action of the Board. The maximum time which the Board will hear any public hearings on the same subject shall be twenty minutes, unless such time limit is waived by action of the Board. Accordingly, the Board encourages proponents on the same subject to determine in advance their principal speakers and these speakers would be accorded first consideration in expending the twenty-minute total allocation to their subject. The Board also encourages all public hearings speakers, whenever possible, (a) to be direct and concise, (b) to avoid repetition of statements made earlier by fellow proponents on the same subject, and (c) to place their views in writing for information of the Board. If questions are to be submitted to the Board, such questions must be in writing. The Superintendent, if requested by the Board, shall provide written responses to such questions subsequent to the Board meeting at which they were posed.

Any hearing may be interrupted at any time on motion of any one member of the Board. If interrupted, the Board then shall decide whether it should continue to hear the speaker in public meeting, whether it should hear the speaker in private executive session, or whether it should refuse to continue hearing the speaker at all. If a request for a public hearing challenges the personal capacity of an employee to render service to this Board, involves a school district matter being litigated in the courts, or concerns the reputation of a pupil or former pupil of this school district, it shall not be placed on the public agenda. Instead, the speaker shall be offered an opportunity to be heard in a private executive session of the Board which shall be held following the meeting of the Board next after receipt of the request for hearing by the Board. No public hearings shall be conducted by the Board at adjourned public or special public meetings unless this rule is expressly waived by the Board at any such meeting.

1023. ENDORSEMENTS BY BOARD OF EDUCATION

The Board of Education shall not endorse organizations or activities which it does not deem to have a direct impact on the educational program of this school district or which it finds are unrelated to the jurisdiction exercised by the Board in the normal course of discharging its duties as the people's trustees of education.

1024. BOARD COMMITTEES

The Board of Education may establish ad hoc or standing committees of its membership to perform fact-finding functions in any matter under jurisdiction of the Board. The Board of Education shall appoint a chairman from one of its membership for each committee established. The Superintendent of Schools shall be an ex officio member of every committee established by the Board of Education and either the Superintendent or his delegate shall attend each meeting of all committees.

A committee shall report its findings of fact to the Board of Education at a public meeting of the Board at which time the whole Board shall consider the findings of fact contained in the report together with the recommendation of the Superintendent.

The Board shall adopt a schedule of times and places at which each of its committees shall meet and no committee may meet at any other time or place than that provided for in the schedule adopted by the Board.

All committee meetings shall be open to the public and the schedule of committee meetings shall be posted on the Board bulletin board located adjacent to the Auditorium of the Education Center. Unless otherwise directed by the chairman of a committee, electronic recordings shall not be made, nor shall minutes be taken of the proceedings at committee meetings.

1025. CITIZENS COMMITTEES

The Board of Education may appoint citizens of the community to serve on citizen committees for the purpose of counseling and advising the Board on matters pertaining to the government of the district. Citizens so appointed shall receive no monetary compensation nor expense reimbursement. The names of citizens proposed for appointment to citizen committees may be considered and tentatively selected in private executive session of the Board, provided, however, that final and official selection of persons appointed to such citizen committees shall be made in public meeting of the Board.

Citizen committees appointed by the Board act in a purely counseling and advisory capacity and their findings and recommendations are not binding on the Board. All findings and recommendations of citizen committees, including minority reports, shall be submitted to the Board as a communication and shall appear as such on a public agenda of the meeting of the Board held next after receipt of the communication by the Board. If a citizen committee communication challenges the personal capacity of an employee to render service to this Board, involves a school district matter being litigated in the courts, or concerns the reputation of a pupil or former pupil of this school district, it shall not be placed on the public agenda. Instead, such communication shall be offered for private consideration of the Board at an executive session which shall be held following the meeting of the Board next after receipt of the communication by the Board.

The Superintendent is enjoined to make available immediately any information to the citizen committee concerning the government of the district which such citizen committee from time to time may request in the course and scope of fulfilling their charge from the Board. Nothing in this section shall be construed to prohibit the employment of professional consultants as permitted in law by the Board.

1026. WRITTEN RECORD OF BOARD PROCEEDING

The official records of proceedings of Board of Education meetings shall be known as the minutes. The minutes shall be a record only of actions taken by the Board of Education, except that any member or the Superintendent may direct that his remarks, or a summary thereof, made during the

meeting, be included in the minutes. The minutes shall be approved by the Board of Education at any subsequent meeting by majority vote of the full membership constituting the Board. The minutes, when approved by the Board of Education, shall be the official records of the proceedings at which they were taken. The President, Secretary, and Schools Attorney shall affix their signatures to the minutes after they have been approved by the Board of Education. The minutes shall be kept forever as permanent public records of this Board. No minutes shall be taken of the proceedings of the Board of Education while convened in executive session.

1027. ELECTRIC RECORDINGS OF BOARD PROCEEDINGS

Where practicable, all meetings of the Board of Education shall be recorded in their entirety by an electrically actuated recording device. Such recordings as are made shall be considered unofficial public records of the proceedings of the Board designed primarily to assist in the preparation of the minutes, and may be erased or destroyed three calendar years after such recordings are made.

1028. PRESERVATION OF WRITTEN COMMUNICATIONS TO BOARD

Written communications to the Board of Education which are considered by this Board as part of the public agenda shall be kept for a period of three calendar years after receipt, following which time they may be destroyed or otherwise discarded any time after such consideration, unless the Board, or any member thereof, requests that such communication be saved. Such request, unless made by a majority of the full membership constituting the Board, shall not be effective to require the keeping of such communication longer than three calendar years following receipt of the communication.

1029. WINTON ACT "MEET AND CONFER" SESSIONS IN SCHOOL DISTRICT EMPLOYER-CERTIFICATED EMPLOYEE RELATIONS

A. All forms of proposals described herein which have been made by the San Diego Unified School District (District) or the San Diego Certificated Employee Council (C.E.C.) in the Winton Act "meet and confer" process are matters of public record under Education Code Section 13089. A file of such proposals, including the position, if any, on such proposals:

1. of each member of the Board of Education expressed by roll call vote at a public Board of Education meeting, or

2. the district's representative, shall be maintained in the office of the Assistant Superintendent, Personnel Division, Room 1241, Education Center, and shall be available for public

inspection during regular working hours within 24 hours of the making of any such proposal.

B. Any initial proposal or proposal made by the Board of Education or the C.E.C. shall be:

1. distributed to 9th District Parent Teachers organization headquarters, and

2. posted on the Board of Education Bulletin Board on the first floor of the Education Center for public viewing.

C. For the purposes of this section, the following definitions shall apply:

1. Initial Proposal. This is an offer for consideration made by either the District or the C.E.C. on a subject matter which has not been introduced by that entity into the "meet and confer" process during the preceding ten months.

2. Proposal. This is an offer for consideration made by either the District or C.E.C. subsequent to the initial proposal and is on the same subject matter but differs in cost or other degree from that entity's initial proposal.

D. An initial proposal made by the District or the C.E.C. shall be made only in public meeting of the Board of Education. Seven consecutive days shall elapse between the making of an initial proposal and any meeting and conferring under the Winton Act upon such initial proposal by the District and the C.E.C., except on subject matter declared by the Board of Education to be of an "emergency" nature as set forth in Education Code Section 13089. Within thirty calendar days following the presentation of the first initial proposal by the C.E.C., the Board of Education shall adopt a position in public meeting in response to such proposal which shall constitute the Board of Education's initial proposal.

E. During such seven-day period or at anytime thereafter, members of the public are welcome to address the Board of Education by letter or in public hearing in public board meetings expressing their views on any initial proposal or proposal in the Winton Act meet and confer process which have been made part of the public record. To facilitate such public comment, each time the Board of Education deems it necessary to consider in public meeting any initial proposal or proposal received from, or to be offered to, the C.E.C., notice of such consideration shall be printed on the meeting agenda under the "Superintendent's General Report" section with an appropriate notation that:

1. it is currently a "meet and confer" item under the "Winton Act" and

2. members of the public are welcome to express their views thereon.

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Board of Education
San Diego Unified School District

1976 POLICY STATEMENT GOVERNING THE LEGISLATIVE AND EXECUTIVE GOVERNMENTAL BRANCH ADVOCACY AND INFORMATION PROGRAM OF THE SAN DIEGO UNIFIED SCHOOL DISTRICT

* * * * *

January, 1976

The Board of Education is of the view that the primary purpose of the San Diego Unified School District is to educate children and youth to become loyal, effective, self-supporting and actively participating American citizens. Accordingly, the Board of Education has committed itself to providing the best possible education for the children and youth of San Diego which is consistent with their individual needs and abilities.

This philosophical commitment can best be achieved through a cooperative State-local partnership in the development, support and conduct of the public schools of California. While the State has a responsibility to guarantee quality education for every pupil, it is the responsibility of local governing boards to see that each pupil receives an educational program appropriate to his needs in the most effective and yet economical manner.

In keeping with this responsibility, the Board adopts this POLICY STATEMENT to guide the Superintendent in implementing the district's advocacy and informational program in dealing with the California Legislature, California State Board of Education and Department of Education, the United States Congress, the United States Department of Health, Education, and Welfare, the United States Office of Education and other Federal and State Agencies which exercise jurisdiction affecting the public schools of San Diego.

To carry out its educational responsibilities, the following specific declarations of district positions, not necessarily in priority order, are approved:

I. State Law Governing Local Public Education

The San Diego Unified School District:

1. Supports State law that will allow local school districts and school boards to improve efficiency and effectiveness of operation.

II. State School Finance

The San Diego Unified School District:

1. Supports legislation establishing an accurate inflation factor in determining a district's revenue base.

2. Supports school finance measures that improve general financial assistance to elementary and secondary education based on the equalization concept, whereby the State assumes a proportionately larger or smaller share of the costs in relationship to the wealth of the district.

3. Supports the policy of State reimbursement to school districts for the full cost of new State-mandated programs and increased State reimbursement for all existing State-mandated programs, including costs attendant to greater citizen participation in decision-making affecting the conduct of schools and/or the district.

4. Supports a policy by which more broadly based State resources are relied upon to assume a proportionately larger share of the costs of financing local public education in California.

5. Supports a policy whereby the State assumes responsibility for providing apportionments to innovative educational programs on a regular A.D.A. basis.

6. Supports major school finance reform legislation that recognizes a cooperative finance position in line with the 1971 California Supreme Court Decision of Serrano vs. Priest.

7. Supports legislation whereby San Diego will, as the State's second largest school district, receive "Urban Factor" aid due to the special problems of urban school districts which result in higher operating costs than in suburban or rural districts.

8. Supports legislation to maintain and expand State financing of Early Childhood Education programs.

9. Supports legislation providing State funding in order to reduce average upper grade elementary regular day class size so that all elementary regular day classes meet the present limits at primary grades. (District average 30.)

10. Supports legislation that would improve State funding to finance voluntary and/or court-ordered measures designed to improve racial balance in San Diego City Schools.

11. Supports legislation which grants State aid on the basis of average daily membership rather than A.D.A. Part of additional support shall be used by local districts for new programs to help reduce all student absence.

II. State School Finance (Cont'd.)

12. Supports legislation which grants State aid for pilot and research programs seeking to find adequate alternative programs to reduce pupil suspensions and expulsions and programs to reduce violence in schools.

13. Supports legislation that would initiate and maintain State financing of programs designed to reform intermediate and secondary education.

14. Supports legislation that would continue State funding to finance the development and expansion of bilingual/bicultural programs for elementary and secondary pupils.

15. Supports legislation which would provide adequate funding at the State and Federal level for the school lunch program in order to maintain the district's present policy of the nonuse of general fund monies for the support of the food service program.

III. Federal Financial Assistance

The Board of Education of the San Diego Unified School District believes that the financing of public education by the Federal Government should be based upon the following principles:

1. The Federal Government should share the same proportion of the cost of educating children whose parents live or work on Federal tax exempt property as is borne by private businesses and homeowners.

2. The Federal Government should pay its proportionate share of the cost of educating children of military personnel.

3. Federal aid should supplement State and local efforts to provide and improve equal educational opportunities for all children.

4. Regardless of the source of funds, their expenditure should be controlled by locally elected boards of education on the basis of identified local needs.

5. The public and private schools should not be considered as a single, unified school system in any form of Federal aid to education. Any required cooperative action or service should be on the basis that the funds follow the child.

6. Supports the concept that access to a good education is a fundamental right that should be recognized as such in our basic Federal law and/or Constitution.

7. Supports the establishment of a cabinet level, separate Department of Education.

The San Diego Unified School District in relationship to immediate and long-range Federal legislation:

III. Federal Financial Assistance (Cont'd.)

Immediate:

1. Supports appropriations that provide funding for Federally connected students at levels which are consistent with the current true costs of education.

2. Supports legislation and appropriations that provide for funds for the construction of school housing for children residing in military housing projects, and for funds for construction of schools to be included in plans for new housing developments.

3. Supports appropriations for special-purpose programs that have demonstrated their effectiveness in accomplishing national goals articulated by the Congress.

4. Supports legislation and appropriations for special-purpose programs to meet emerging educational needs, i.e., early childhood education, secondary education, vocational and career education, education of the handicapped and other children with special needs, and programs for desegregation of students or staff.

5. Supports legislation which will require full-funding of Federal mandated programs by the Federal Government.

Long-Range:

1. Supports plans to terminate short-term, temporary categorical aid programs, and at the same time encourages the general support of schools so that funds will be available, on a continuing basis, to all school districts to implement and sustain successful pilot and demonstration programs.

2. Works for the consolidation, streamlining, and improvement of administrative procedures for all Federally aided programs.

3. Supports legislation and appropriations that provide for the "pass through" of Federal funds to local school districts, whether the funds are designated as revenue sharing for education, block grants, or other methods.

4. Seeks to maintain the separate identity of the public schools in all Federal aid to education legislation.

5. Supports the principle of advance funding rather than reimbursement.

IV. Community Planning

The San Diego Unified School District:

1. Supports legislation to include expansion of the role of large urban school districts and other school districts in the community planning process as such process affects local public education.

IV. Community Planning (Cont'd.)

2. Supports the community school concept in elementary, secondary, and adult education.

V. Budgeting and Accounting

The San Diego Unified School District:

1. Supports legislation designed to make the annual budget process deadlines of local school districts more realistic and consistent with the needs of local districts throughout the State.

VI. School Site Acquisition and Construction

The San Diego Unified School District:

1. Supports the policy of disbursement of State School Building funds on an equalized basis to all school districts.

2. Supports legislation to broaden the legal authority of school districts to develop alternative solutions to the problems of school construction, including lease and lease-purchase of school buildings and equipment, and State bonds for local school construction.

3. Supports a policy to reduce from 66-2/3% the necessary "yes" vote to approve school construction bonds.

4. Supports legislation to lengthen the maximum term of general obligation school construction bonds from 25 years to 30 or 35 years.

VII. Personnel

The San Diego Unified School District:

1. Supports legislation that facilitates the governance and orderly administration of school districts with declining school enrollments.

2. Supports the granting of more flexibility to local school districts in dealing with employment matters.

3. Supports State financing of staff training when such training is required by State legislation.

4. Opposes legislation which mandates requirements that school districts must provide services and benefits to employees in areas subject to collective bargaining.

5. Supports legislation that facilitates equal employment opportunity and affirmative action in regards to minorities and women but leaves school districts the maximum flexibility in implementing affirmative action programs.

VIII. Equal Opportunity

The San Diego Unified School District:

1. Supports legislation that provides for the reduction or elimination of inequality of educational opportunity which stems from racial isolation.

2. Supports legislation in keeping with sound educational policies to prevent and eliminate segregation in public schools on account of race, color, or ethnic group.

3. Supports legislation that provides extra financial assistance for school districts which institute programs to reduce racial isolation and segregation.

IX. Special Education

The San Diego Unified School District:

1. Supports the proposed State Master Plan for Special Education where adequate and fair provision is made for State funding of special education programs and all types of physical handicaps.

2. Supports legislation to provide partial State financing of transportation for educable mentally retarded (EMR) students attending classes in schools other than their school of normal attendance.

3. Supports legislative proposals which expand the opportunity to place additional qualified students in educationally handicapped (EH) classes with commensurate State financing.

X. Career Education

The San Diego Unified School District:

1. Supports legislation to improve the A.D.A. reimbursement for vocational programs, including work experience programs.

2. Supports legislation to eliminate the work experience counselor load ratio in present statutes and to allow paraprofessionals to make job contacts, job placements, and supervise on-the-job experiences.

3. Supports the development of legislation to provide a California career education act with vocational education as an integral component.

4. Supports passage of legislation which enables San Diego Unified School District to receive same level of annual operating funds from the State as is currently received by the County Superintendent of Schools.

XI. Instructional Television

The San Diego Unified School District:

1. Supports improved funding for local and/or regional Instructional Television Authorities.

2. Supports State funding for equipment and local production in local and/or regional Instructional Television Authorities.

XII. Student Transportation

The San Diego Unified School District:

1. Supports legislation that would both improve State funding and place State funding reimbursement on a current year basis to finance transportation of students from outlying areas in cities where such transportation is deemed inadequate by the Board of Education having jurisdiction and where there are insufficient public school facilities to serve such areas concurrent with need.

2. Supports legisaltion that would improve State funding to finance any transportation of students necessary to comply with a student racial desegregation order issued by any Federal or State court against a California school district.

3. Supports legislation that would augment public transit funds to provide more public transportation service to schools in urban and suburban areas to encourage lesser use of automobiles by students.

4. Supports legislation which will provide State funds for capital financing of urban school bus systems on a leaseback concept, and provide funds for sharing between State and local districts the costs of such transportation if public transit cannot be adequately augmented.

5. Supports legislation that would improve the safety (procedures and physical conditions) on school busses and/or busses used primarily for transporting students.

XIII. Employer-Employee Relations

The San Diego Unified School District:

1. Supports legislation for California public elementary and secondary schools which embodies meaningful collective bargaining in employer-employee relations law and protects the interests of (a) the People, (b) the elected representatives of the People serving as the Board of Education, (c) the students, and (d) the district employees.

XIV. Instructional Materials and Information Resources

1. Supports legislation to continue State support for K-8 instructional materials, and to improve the current level of funding to the point that it is realistic in terms of school needs and materials prices, and to establish a funding level which is tied to the consumer price index.

2. Supports legislation to implement library media program development, resource sharing, and information exchange.

3. Supports legislation which provides for a greater variety of instructional materials, increased local choice of instructional materials, prompt delivery of materials from the State printer, and increased State support to the Instructional Materials Fund.

Cooperative Legislative Action

The San Diego Board of Education recognizes the need for cooperative legislative action in implementing this policy. Sponsorship of legislative proposals with The Big Five Association of Public School Districts is supported and is based on the following criteria:

1. Must not be detrimental to any member district.

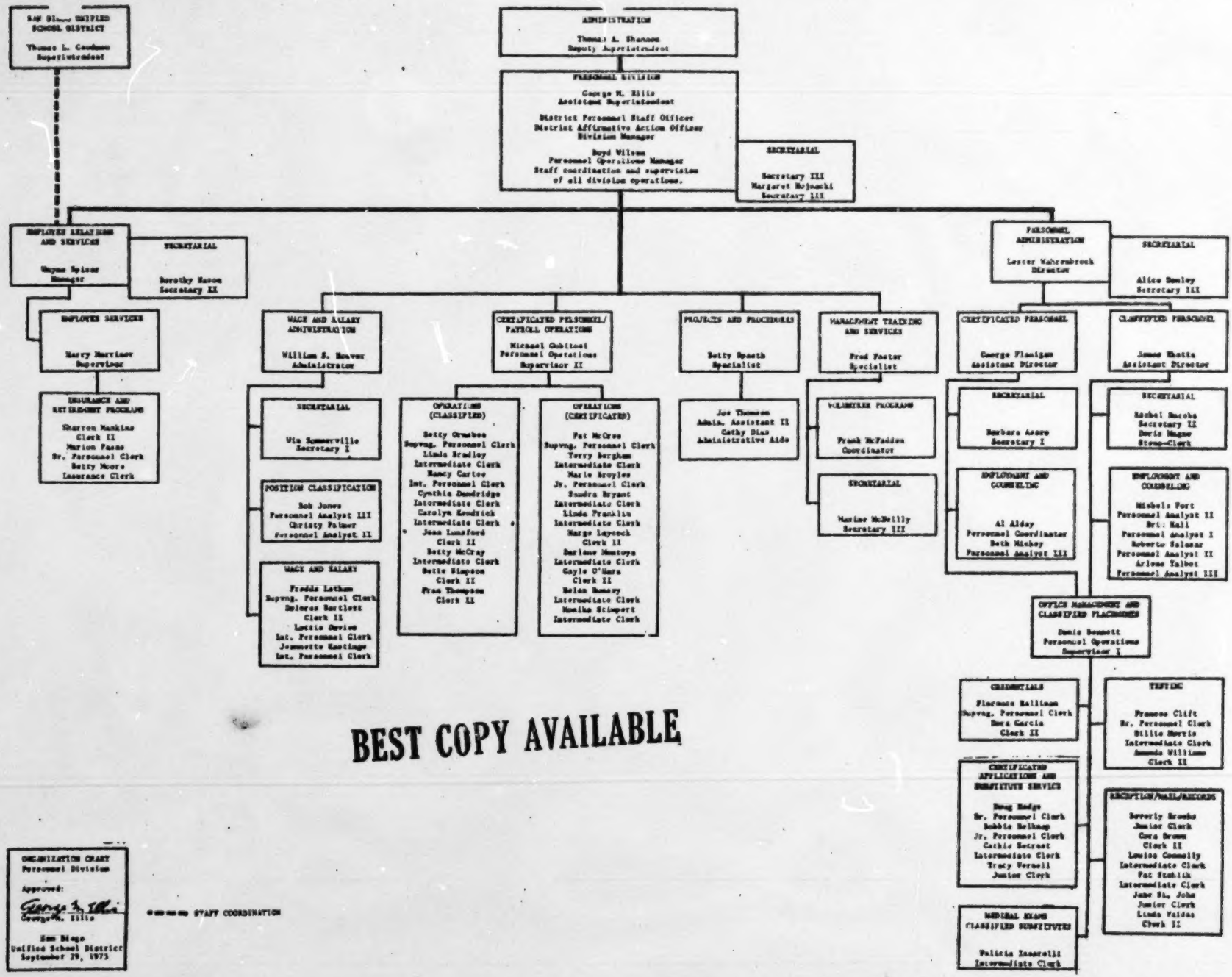
2. Must have co-authors representing a majority of the member districts.

3. Must have approval of the Big Five Board of Directors.

TLG:NEW
vjh

APPENDIX B

SAMPLE ORGANIZATION CHARTS FOR DIVISIONS AND DEPARTMENTS



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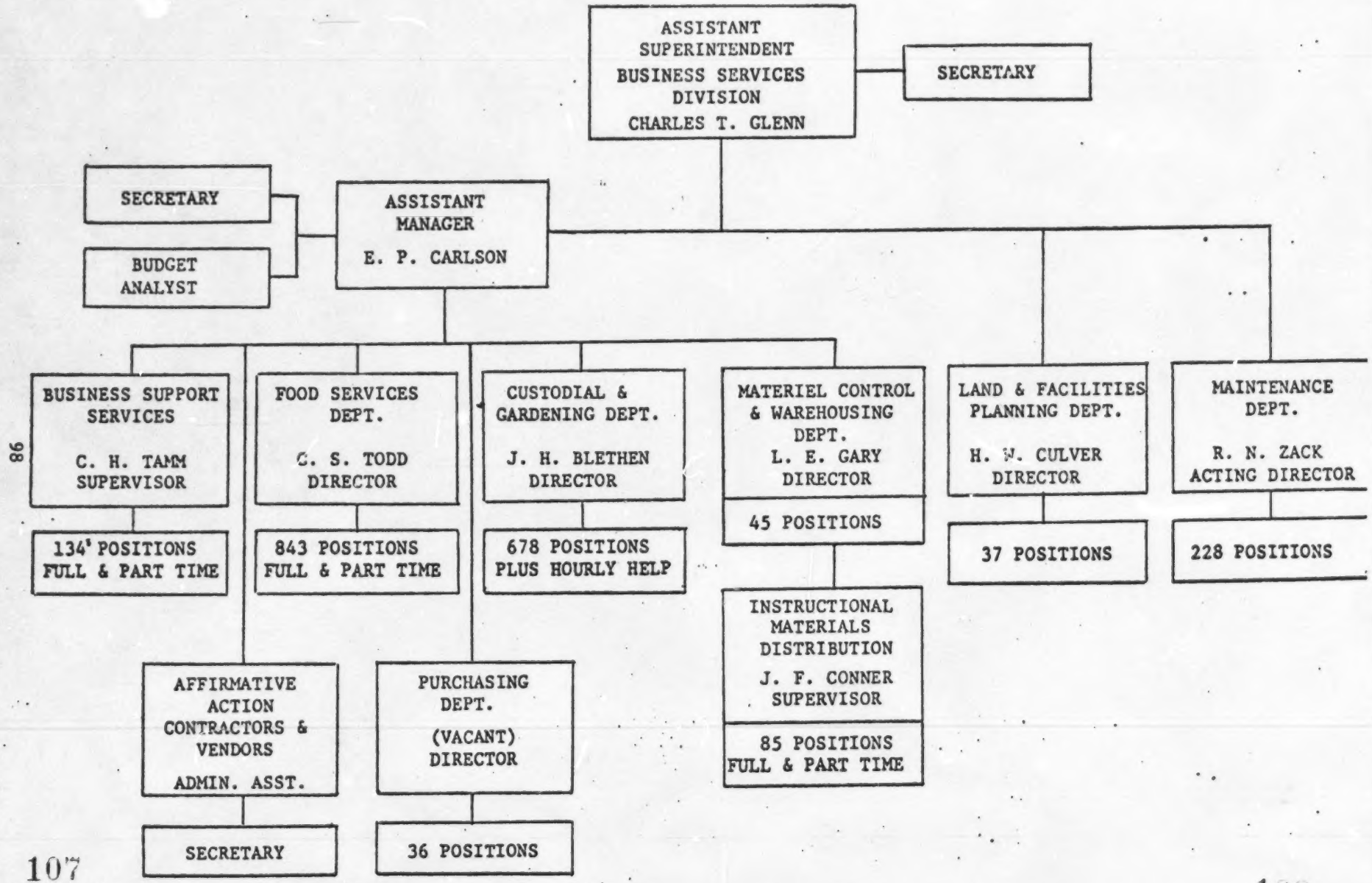
ASSISTANT SUPERINTENDENT BUSINESS SERVICES DIVISION CHARLES T. GLENN
SECRETARY
SECRETARY
BUDGET ANALYST
ASSISTANT MANAGER E. P. CARLSON
BUSINESS SUPPORT SERVICES C. H. TAMM SUPERVISOR
134 POSITIONS FULL & PART TIME
FOOD SERVICES DEPT. C. S. TODD DIRECTOR
843 POSITIONS FULL & PART TIME
CUSTODIAL & GARDENING DEPT. J. H. BLETHEN DIRECTOR
678 POSITIONS PLUS HOURLY HELP
MATERIEL CONTROL & WAREHOUSING DEPT. L. E. GARY DIRECTOR
45 POSITIONS
LAND & FACILITIES PLANNING DEPT. H. W. CULVER DIRECTOR
37 POSITIONS
MAINTENANCE DEPT. R. N. ZACK ACTING DIRECTOR
228 POSITIONS
INSTRUCTIONAL MATERIALS DISTRIBUTION J. F. CONNER SUPERVISOR
85 POSITIONS FULL & PART TIME
AFFIRMATIVE ACTION CONTRACTORS & VENDORS ADMIN. ASST.
SECRETARY
PURCHASING DEPT. (VACANT) DIRECTOR
36 POSITIONS

86

107

108

BUSINESS SERVICES DIVISION
PRESENT ORGANIZATION CHART

SAN DIEGO UNIFIED SCHOOL DISTRICT
FINANCE DEPARTMENT

CONTROLLER
A. Ronald Oakes

Secretary III
Virginia Sandera

ACCOUNTING DEPARTMENT
Chief Accountant - P. Lippman

Secretary III
Virginia Sandera

FINANCIAL ACCOUNTING
Financial Analyst II
Rick Knott

Financial Analyst I
Kent Stallman
Dick Kropidlowski

Accountant
Hazel Gautsche
J. L. Geitz
Mercedes Ang
Delores Holden AX

Junior Accountant
Mable O'Donnell

Sr. Accounting Clerk
Ruth Herzig
Dorothy Palmer
Loretta Hager
Yvonne McMillen
Catherine Farris AX

Clerk-Bookkeeper
Yoshiko Hug

Accounting Clerk
Maria Whetstine CETA

RESOURCE CONTROL AND ANALYSIS
Senior Accountant
Robert George

Accountant
Bob Childs
Mary Estes, 11 mos.

Senior Clerk
Mildred Kaiser
Winnie Montgomery, 11 mos.

Clerk II
Jeanette McEowen, 11 mos.
Laverne Wallace
Audrey Murphy, 11 mos.

Intermediate Clerk
Stephanie Harper

INTERNAL CONTROL AND DISBURSEMENT
Internal Controls Supervisor - Steve Dato

Accountant
Bill Haynes
Wayne Austin
John Peters CETA

Senior Clerk
Anna McCrerey
Doris Nielsen
Marilyn Raines

Clerk II
Anna Anderson

Intermediate Clerk
Lois Mackey

FOOD SERVICES ACCOUNTING
Budget Analyst
Mike Heatly

Accountant
Irene Brahm

Accounting Clerk
Dorothy Bauer

Clerk-Bookkeeper
Harriet Holmes, 10 mos.
Vivian McGorman, 10 mos.
Barbara Zay, 10 mos.

Intermediate Clerk
Susan Berry, 10 mos.

Junior Clerk
Delia Tibbetts CETA

BUDGETS & COST CONTROLS
Director - Henry Hurley

Clerk II
Mildred Catlin

Sr. Budget Analyst
Bill Biggs

Budget Analysts
Bob Breister
Alex Krohn
Royce Walkenhorst
Joseph Slade

Budget Technician
Janet Tarantino

Accounting Clerk
Christy Husson

Intermediate Clerk
Thelma Wilson
Lorina Smith CETA

66

11

109

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2/3/76

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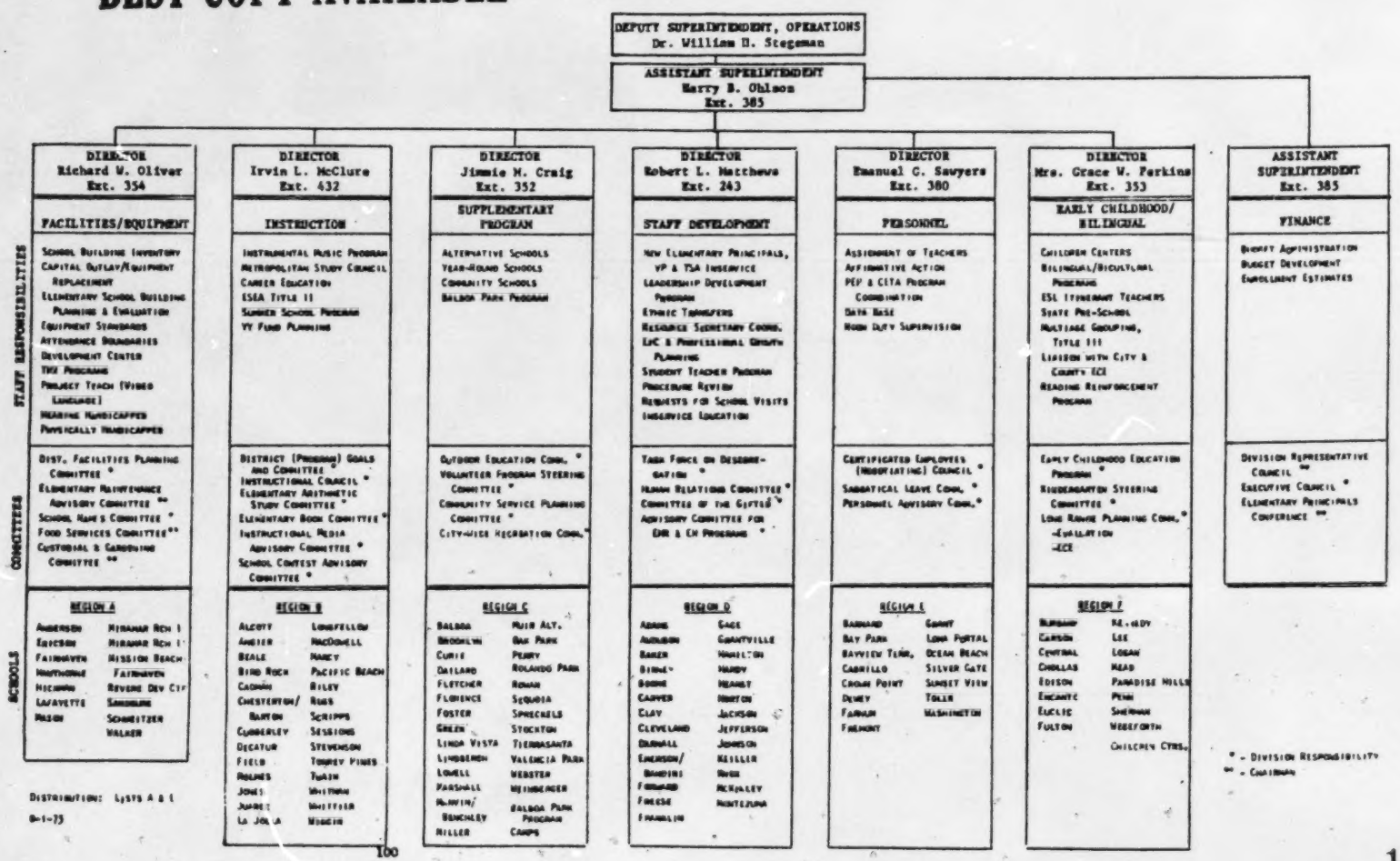
SAN DIEGO CITY SCHOOLS
Elementary Schools Division

ASSIGNMENT OF STAFF RESPONSIBILITIES



Distribution: Lists A & C
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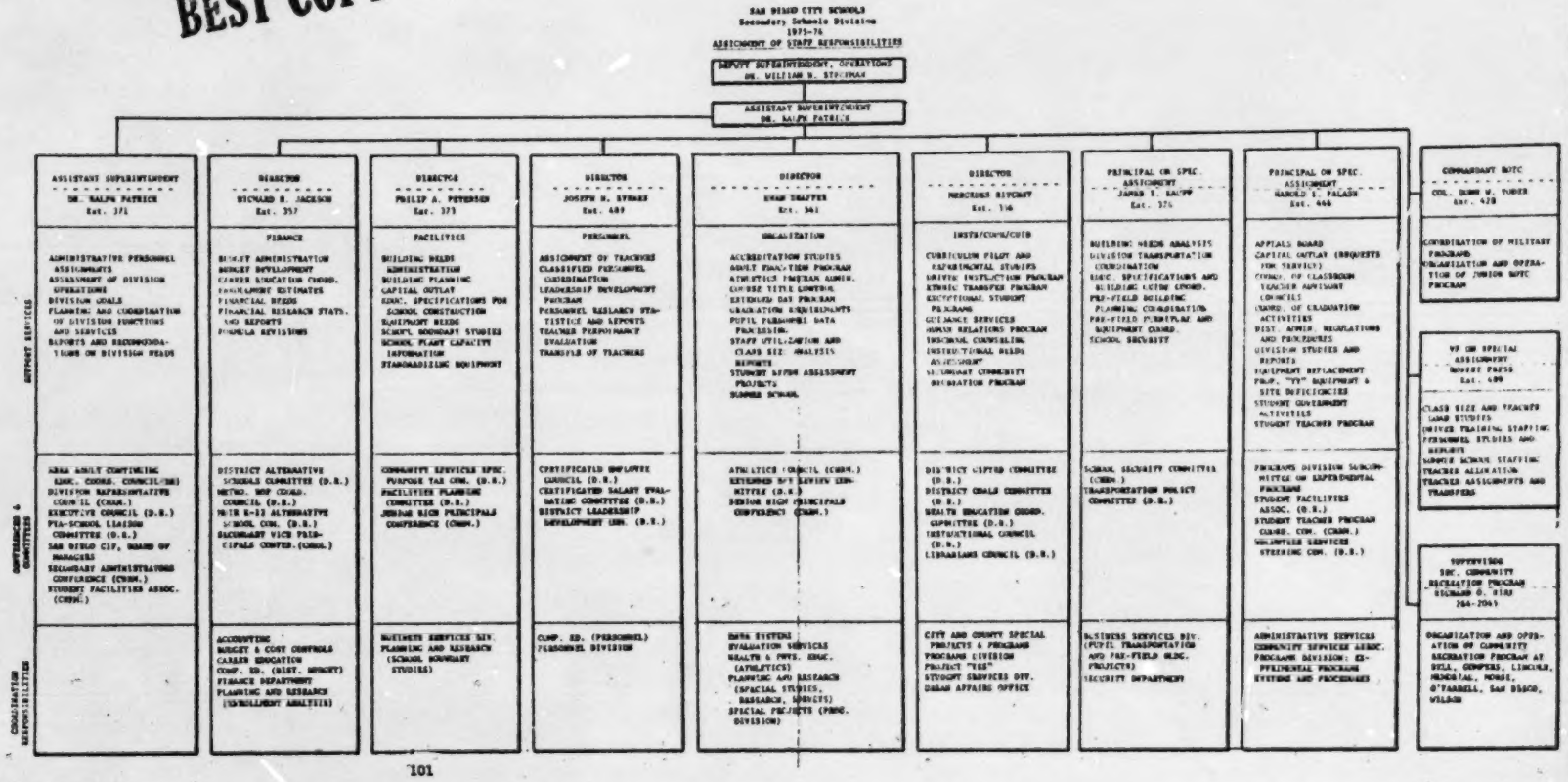

(D.R. - Division Representative)

6/13/75

SAN DIEGO UNIFIED SCHOOL DISTRICT
FINANCE DEPARTMENT

CONTROLLER
A. Ronald Oakes

Secretary III
Virginia Sandera

ACCOUNTING DEPARTMENT
Chief Accountant - P. Lippman

Secretary III
Virginia Sandera

FINANCIAL ACCOUNTING
Financial Analyst II
Rick Knott

Financial Analyst I
Kent Stallman
Dick Kropidlowski

Accountant
Hazel Gautsche
J. L. Geitz
Mercedes Ang
Delores Holden AX
Junior Accountant
Mable O'Donnell

Sr. Accounting Clerk
Ruth Herzig
Dorothy Palmer
Loretta Hager
Yvonne McMillen
Catherine Farris AX
Clerk-Bookkeeper
Yoshiko Hug

Accounting Clerk
Maria Whetstine CETA

RESOURCE CONTROL AND ANALYSIS
Senior Accountant
Robert George

Accountant
Bob Childs
Mary Estes, 11 mos.

Senior Clerk
Mildred Kaiser
Winnie Montgomery, 11 mos.

Clerk II
Jeanette McEowen, 11 mos.
Laverne Wallace
Audrey Murphy, 11 mos.

Intermediate Clerk
Stephanie Harper

INTERNAL CONTROL AND DISBURSEMENT
Internal Controls Supervisor - Steve Dato

Accountant
Bill Haynes
Wayne Austin
John Peters CETA
Senior Clerk
Anna McCrerey
Doris Nielsen
Marilyn Raines

Clerk II
Anna Anderson

Intermediate Clerk
Lois Mackey

FOOD SERVICES ACCOUNTING
Budget Analyst
Mike Heatly

Accountant
Irene Brahm

Accounting Clerk
Dorothy Bauer

Clerk-Bookkeeper
Harriet Holmes, 10 mos.
Vivian McGorman, 10 mos.
Barbara Zay, 10 mos.

Intermediate Clerk
Susan Berry, 10 mos.

Junior Clerk
Delia Tibbetts CETA

BUDGETS & COST CONTROLS
Director - Henry Hurley

Clerk II
Mildred Catlin

Sr. Budget Analyst
Bill Biggs

Budget Analysts
Bob Breister
Alex Krohn
Royce Walkenhorst
Joseph Slade
Budget Technician
Janet Tarantino

Accounting Clerk
Christy Husson

Intermediate Clerk
Thelma Wilson
Lorina Smith CETA

66

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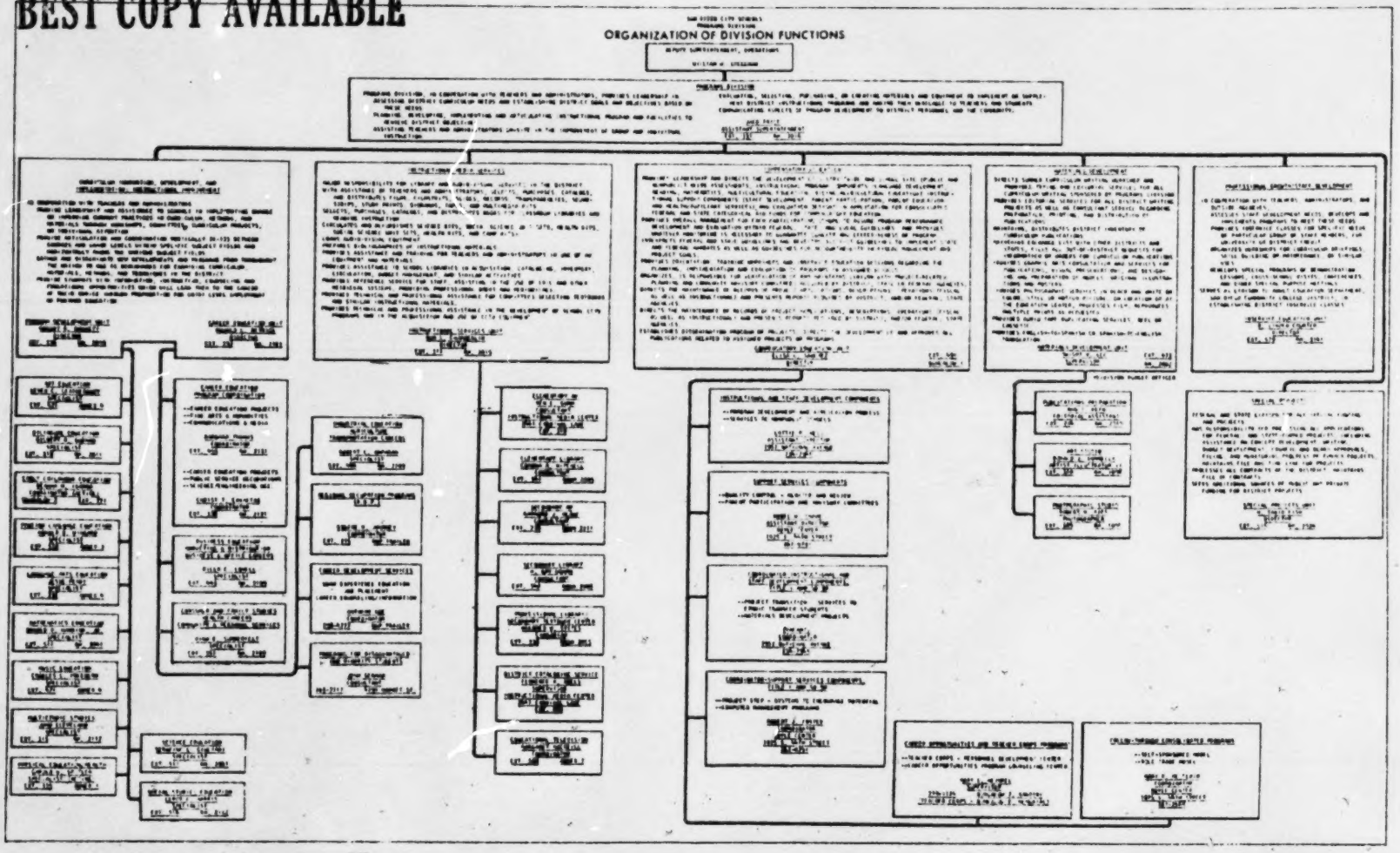

SAN DIEGO CITY SCHOOLS
STUDENT SERVICES DIVISION

ORGANIZATION OF DIVISION FUNCTIONS

ASSISTANT SUPERINTENDENT, STUDENT SERVICES
DR. SCOTT C. GRAY
EXTENSION 391

PLANS AND RECOMMENDS PROGRAM, POLICIES, AND GOALS FOR THE PROVISION OF VARIOUS SERVICES ESSENTIAL TO A HIGH QUALITY STUDENT SERVICE PROGRAM, AND PROVIDES SERVICES TO SITE ADMINISTRATORS AS NEEDED.
DIRECTS THE OPERATION AND ADMINISTRATION OF THE PROGRAM OF STUDENT AND PUPIL PERSONNEL SERVICES FOR THE DISTRICT.
INITIATES AND LEADS PROJECTS FOR THE IMPROVEMENT OF PROGRAMS AND SERVICES FOR ATYPICAL PUPILS.
ESTABLISHES AND MAINTAINS HIGH STANDARDS OF PERFORMANCE IN ALL STUDENT-SERVICE PROGRAMS AND EVALUATES EFFECTIVENESS OF RESULTS.
COORDINATES THE ACTIVITIES OF DEPARTMENTS WITHIN THE DIVISION IN ORDER TO INSURE MAXIMUM COOPERATION AND MINIMUM OVERLAPPING OF SERVICES.
DIRECTS SPECIAL STUDIES IN ORDER TO DETERMINE PROPER STAFFING RATIOS FOR VARIOUS TYPES OF SERVICES PROVIDED BY THE DIVISION.
DIRECTS THE ASSIGNMENT OF PUPIL PERSONNEL SERVICES NEEDED TO SUPPORT SCHOOL OPERATIONS.
SELECTS, TRAINS AND EVALUATES PERFORMANCE OF ASSIGNED SUBORDINATES.
IDENTIFIES AND PROVIDES TRAINING EXPERIENCES FOR STAFF MEMBERS OF THE STUDENT SERVICES DIVISION WITH POTENTIAL FOR WIDER LEADERSHIP.
RECOMMENDS BUDGET REQUIRED TO MAINTAIN AN ADEQUATE PROGRAM OF STUDENT SERVICES NEEDED FOR THE EFFICIENT CONDUCT OF THE INSTRUCTIONAL PROGRAM IN ALL SCHOOLS.
SERVES AS A MEMBER OF THE EXECUTIVE COUNCIL, THE CHIEF PURPOSES OF WHICH ARE TO MAINTAIN TOP-LEVEL COMMUNICATIONS ON DISTRICT-WIDE POLICY MATTERS AND TO SERVE AS A REVIEW GROUP WHEN GROUP JUDGMENT AND EXPERIENCE ARE DESIRABLE OR NECESSARY TO DECISION MAKING.
PROVIDES CLINICAL AND OTHER SPECIAL SERVICES ESSENTIAL TO WELFARE OF INDIVIDUAL STUDENTS.
WORKS WITH PUBLIC AND PRIVATE AGENCIES INTERESTED IN THE WELFARE OF CHILDREN AND YOUTH.

DIVISION BUDGET OFFICER AND ADMINISTRATIVE AIDE
MR. ROMAN R. LEWINSKI
EXT. 440

INSCHOOL COUNSELING AND SPECIAL PROGRAMS DIRECTOR
MR. EUGENE F. BRUCKER
EXTENSION 484

HEALTH SERVICES ADMINISTRATIVE DIRECTOR
MR. EDWARD S. FLETCHER
233-8951

GUIDANCE SERVICES/PHYSICALLY HANDICAPPED PROGRAMS DIRECTOR
MR. DANIEL H. LOCHTEFELD
EXTENSION 482

PLEASE SEE PAGE 2
FOR
DEPARTMENTAL LINE
AND STAFF ORGANIZATION

PLEASE SEE PAGE 3
FOR
DEPARTMENTAL LINE
AND STAFF ORGANIZATION

PLEASE SEE PAGE 4
FOR
DEPARTMENTAL LINE
AND STAFF ORGANIZATION

INSCHOOL COUNSELING AND SPECIAL PROGRAMS DIRECTOR
MR. EUGENE F. BRUCKER
EXTENSION 484

TO PLAN AND DIRECT PROGRAMS FOR GIFTED, MENTALLY RETARDED AND EDUCATIONALLY HANDICAPPED PUPILS: TO PLAN AND DIRECT THE INSCHOOL COUNSELING PROGRAM.
PLANS AND RECOMMENDS PROGRAMS, OBJECTIVES AND POLICIES FOR THE COUNSELING PROGRAM AT THE INDIVIDUAL SCHOOL SITES.
PROVIDES LEADERSHIP AND CONSULTIVE SERVICE IN PLANNING, RECOMMENDING POLICY, DETERMINING BUDGET NEEDS, SETTING GOALS AND OBJECTIVES, AND FOLLOWING STATE MANDATES IN PROGRAMS FOR GIFTED, MENTALLY RETARDED AND EDUCATIONALLY HANDICAPPED.
ASSISTS IN THE DEVELOPMENT OF THE DIVISIONAL BUDGET AS IT APPLIES TO INSCHOOL COUNSELING/SPECIAL PROGRAMS FOR SUBMISSION TO THE ASSISTANT SUPERINTENDENT, STUDENT SERVICES.
MAKES RECOMMENDATIONS FOR ITEMS TO BE INCLUDED IN OTHER DIVISIONS' BUDGETS (ELEMENTARY SCHOOLS DIVISION, SECONDARY SCHOOLS DIVISION, PROGRAMS DIVISION), FOR ALL PROGRAMS LISTED.
INTERPRETS POLICY AND PROCEDURES TO ALL OPERATING DIVISIONS THROUGH THE APPROPRIATE ASSISTANT SUPERINTENDENT AND ADMINISTRATIVE BODIES.
COORDINATES REPORTS IN ALL SECTIONS OF THE DEPARTMENT THAT MAY BE PRESENTED TO THE BOARD OF EDUCATION, CURRICULUM COUNCIL, SUPERINTENDENT'S COUNCIL, ELEMENTARY AND SECONDARY PRINCIPAL GROUPS.
REPRESENTS THE DIVISION AND DISTRICT ON RELATED PROJECTS DEVELOPED BY PRIVATE AND/OR GOVERNMENTAL AGENCIES.
INTERPRETS DEPARTMENT PROGRAMS TO COMMUNITY GROUPS AND INTERESTED CITIZENS.
ASSISTS IN THE DEVELOPMENT OF A SCREENING AND ELIGIBILITY PROGRAM FOR COUNSELING PERSONNEL.
SELECTS, TRAINS, AND EVALUATES PERFORMANCE OF ASSIGNED SUBORDINATES.

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SUPERVISOR
EH/EMR
EXT. 238

SUPERVISOR
GIFTED
DR. DAVID HERMANSON
EXT. 486

HEAD COUNSELOR
ON
SPECIAL ASSIGNMENT
MR. CHARLES GAMLE
EXT. 441

RESOURCE TEACHER
EH
MR. PAUL LORINGER
EXT. 348

RESOURCE TEACHER
EMR
EXT. 348

RESOURCE TEACHER
GIFTED
MR. WILLIAM BURROWS
EXT. 244

RESOURCE TEACHER
GIFTED
MRS. WONA CONNER
EXT. 244

INSCHOOL
COUNSELORS

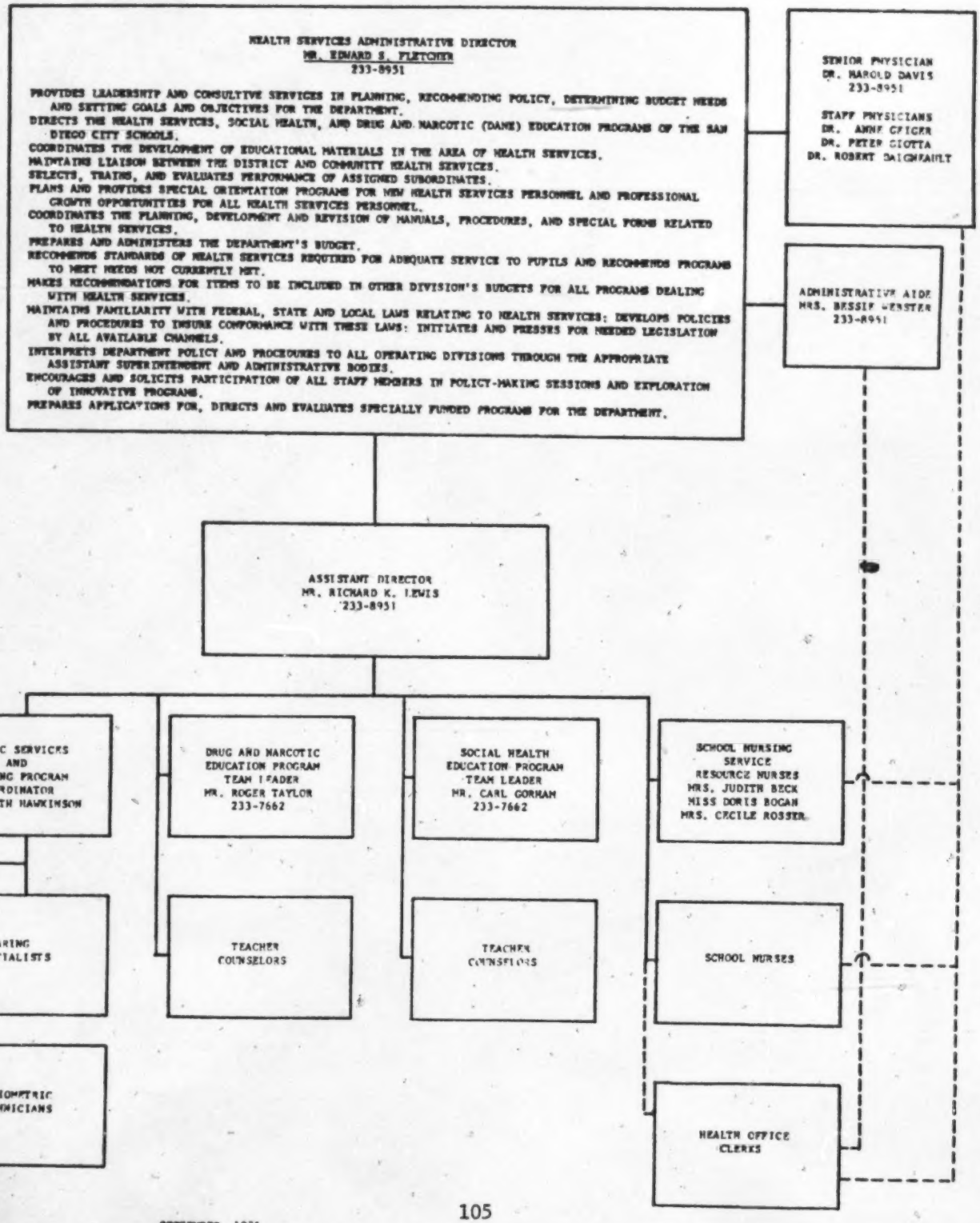
RESOURCE TEACHER
EH
EXT. 348

ROP COUNSELOR
MRS. JACQUELYN MARTIN
560-4422

RESOURCE TEACHER
GIFTED
MR. OLE KITTLESON
EXT. 244

RESOURCE TEACHER
GIFTED
MRS. CARLA NEWTON
EXT. 244

RESOURCE TEACHER
GIFTED
MRS. BETTY TETZKE
EXT. 244


HEALTH SERVICES ADMINISTRATIVE DIRECTOR
MR. EDWARD S. FLETCHER
233-8951
PROVIDES LEADERSHIP AND CONSULTIVE SERVICES IN PLANNING, RECOMMENDING POLICY, DETERMINING BUDGET NEEDS AND SETTING GOALS AND OBJECTIVES FOR THE DEPARTMENT.
DIRECTS THE HEALTH SERVICES, SOCIAL HEALTH, AND DRUG AND NARCOTIC (DANE) EDUCATION PROGRAMS OF THE SAN DIEGO CITY SCHOOLS.
COORDINATES THE DEVELOPMENT OF EDUCATIONAL MATERIALS IN THE AREA OF HEALTH SERVICES.
MAINTAINS LIAISON BETWEEN THE DISTRICT AND COMMUNITY HEALTH SERVICES.
SELECTS, TRAINS, AND EVALUATES PERFORMANCE OF ASSIGNED SUBORDINATES.
PLANS AND PROVIDES SPECIAL ORIENTATION PROGRAMS FOR NEW HEALTH SERVICES PERSONNEL AND PROFESSIONAL GROWTH OPPORTUNITIES FOR ALL HEALTH SERVICES PERSONNEL.
COORDINATES THE PLANNING, DEVELOPMENT AND REVISION OF MANUALS, PROCEDURES, AND SPECIAL FORMS RELATED TO HEALTH SERVICES.
PREPARES AND ADMINISTERS THE DEPARTMENT'S BUDGET.
RECOMMENDS STANDARDS OF HEALTH SERVICES REQUIRED FOR ADEQUATE SERVICE TO PUPILS AND RECOMMENDS PROGRAMS TO MEET NEEDS NOT CURRENTLY MET.
MAKES RECOMMENDATIONS FOR ITEMS TO BE INCLUDED IN OTHER DIVISION'S BUDGETS FOR ALL PROGRAMS DEALING WITH HEALTH SERVICES.
MAINTAINS FAMILIARITY WITH FEDERAL, STATE AND LOCAL LAWS RELATING TO HEALTH SERVICES; DEVELOPS POLICIES AND PROCEDURES TO INSURE CONFORMANCE WITH THESE LAWS; INITIATES AND PRESSES FOR NEEDED LEGISLATION BY ALL AVAILABLE CHANNELS.
INTERPRETS DEPARTMENT POLICY AND PROCEDURES TO ALL OPERATING DIVISIONS THROUGH THE APPROPRIATE ASSISTANT SUPERINTENDENT AND ADMINISTRATIVE BODIES.
ENCOURAGES AND SOLICITS PARTICIPATION OF ALL STAFF MEMBERS IN POLICY-MAKING SESSIONS AND EXPLORATION OF INNOVATIVE PROGRAMS.
PREPARES APPLICATIONS FOR, DIRECTS AND EVALUATES SPECIALLY FUNDED PROGRAMS FOR THE DEPARTMENT.
SENIOR PHYSICIAN
DR. HAROLD DAVIS
233-8951
STAFF PHYSICIANS
DR. ANNE GRIGGS
DR. PETER GIOTTA
DR. ROBERT DAIGNEAULT
ADMINISTRATIVE AIDE
MRS. BESSIE WEBSTER
233-8951
ASSISTANT DIRECTOR
MR. RICHARD K. LEWIS
233-8951
CLINIC SERVICES AND HEARING PROGRAM COORDINATOR
MISS RUTH HAWKINSON
DRUG AND NARCOTIC EDUCATION PROGRAM TEAM LEADER
MR. ROGER TAYLOR
233-7662
SOCIAL HEALTH EDUCATION PROGRAM TEAM LEADER
MR. CARL GORHAM
233-7662
SCHOOL NURSING SERVICE RESOURCE NURSES
MRS. JUDITH BECK
MISS DORIS BOGAN
MRS. CECILE ROSSER
HEARING SPECIALISTS
TEACHER COUNSELORS
TEACHER COUNSELORS
SCHOOL NURSES
AUDIOMETRIC TECHNICIANS
HEALTH OFFICE CLERKS

SEPTEMBER, 1975

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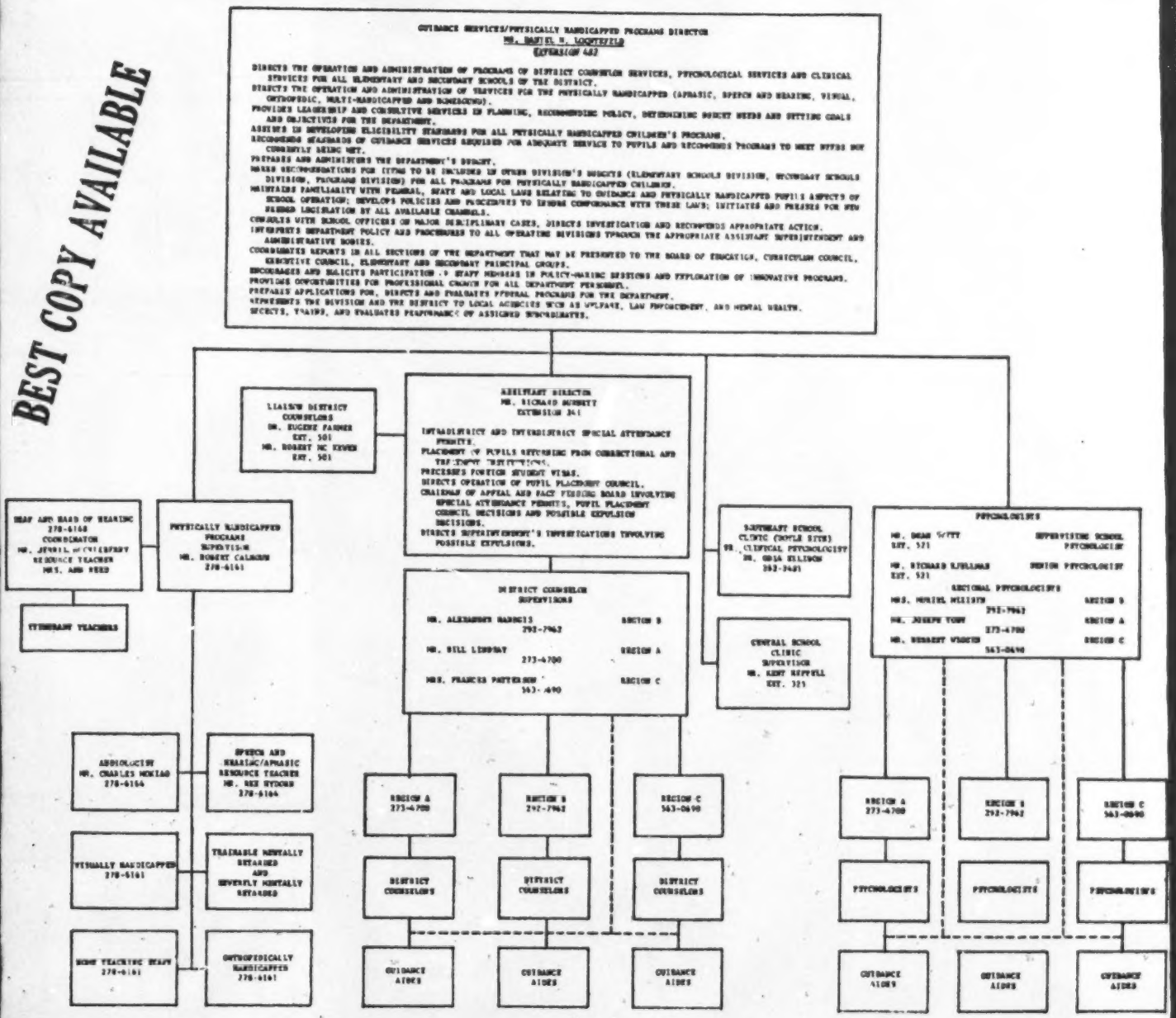
GUIDANCE SERVICES/PHYSICALLY HANDICAPPED PROGRAMS DIRECTOR
MR. DARYL W. LOCKFIELD
EXTENSION 421
DIRECTS THE OPERATION AND ADMINISTRATION OF PROGRAMS OF DISTRICT COUNSELOR SERVICES, PSYCHOLOGICAL SERVICES AND CLINICAL SERVICES FOR ALL ELEMENTARY AND SECONDARY SCHOOLS OF THE DISTRICT.
DIRECTS THE OPERATION AND ADMINISTRATION OF SERVICES FOR THE PHYSICALLY HANDICAPPED (APHASIC, SPEECH AND HEARING, VISUAL, ORTHOPEDIC, MULTI-HANDICAPPED AND HOMEBOUND).
PROVIDES LEADERSHIP AND CONSULTIVE SERVICES IN PLANNING, RECOMMENDING POLICY, DETERMINING BUDGET NEEDS AND SETTING GOALS AND OBJECTIVES FOR THE DEPARTMENT.
ASSISTS IN DEVELOPING ELIGIBILITY STANDARDS FOR ALL PHYSICALLY HANDICAPPED CHILDREN'S PROGRAMS.
RECOMMENDS GUIDANCE SERVICES REQUIRED FOR ADEQUATE SERVICE TO PUPILS AND RECOMMENDS PROGRAMS TO MEET NEEDS NOT CURRENTLY BEING MET.
PREPARES AND ADMINISTERS THE DEPARTMENT'S BUDGET.
MAKES RECOMMENDATIONS FOR ITEMS TO BE INCLUDED IN OTHER DIVISION'S BUDGETS (ELEMENTARY SCHOOLS DIVISION, SECONDARY SCHOOLS DIVISION, PROGRAMS DIVISION) FOR ALL PROGRAMS FOR PHYSICALLY HANDICAPPED CHILDREN.
MAINTAINS FAMILIARITY WITH FEDERAL, STATE AND LOCAL LAWS RELATING TO GUIDANCE AND PHYSICALLY HANDICAPPED PUPILS ASPECTS OF SCHOOL OPERATION; DEVELOPS POLICIES AND PROCEDURES TO ENSURE COMPLIANCE WITH THESE LAWS; INITIATES AND PHRASES FOR NEW PENDED LEGISLATION BY ALL AVAILABLE CHANNELS.
CONSULTS WITH SCHOOL OFFICERS ON MAJOR DISCIPLINARY CASES, DIRECTS INVESTIGATION AND RECOMMENDS APPROPRIATE ACTION.
INTERPRETS DEPARTMENT POLICY AND PROCEDURES TO ALL OPERATING DIVISIONS THROUGH THE APPROPRIATE ASSISTANT SUPERINTENDENT AND ADMINISTRATIVE BODIES.
COORDINATES REPORTS IN ALL SECTIONS OF THE DEPARTMENT THAT MAY BE PRESENTED TO THE BOARD OF EDUCATION, CURRICULUM COUNCIL, EXECUTIVE COUNCIL, ELEMENTARY AND SECONDARY PRINCIPAL GROUPS.
ENCOURAGES AND SOLICITS PARTICIPATION OF STAFF MEMBERS IN POLICY-MAKING SESSIONS AND EXPLORATION OF INNOVATIVE PROGRAMS.
PROVIDES OPPORTUNITIES FOR PROFESSIONAL GROWTH FOR ALL DEPARTMENT PERSONNEL.
PREPARES APPLICATIONS FOR, DIRECTS AND EVALUATES FEDERAL PROGRAMS FOR THE DEPARTMENT.
REPRESENTS THE DIVISION AND THE DISTRICT TO LOCAL AGENCIES SUCH AS WELFARE, LAW ENFORCEMENT, AND MENTAL HEALTH.
SELECTS, TRAINS, AND EVALUATES PERFORMANCE OF ASSIGNED SUBORDINATES.
LIAISON DISTRICT COUNSELORS
DR. EUGENE PARMER
EXT. 501
MR. ROBERT MC KEVER
EXT. 501
ASSISTANT DIRECTOR
MR. RICHARD DOHERTY
EXTENSION 341
INTRADISTRICT AND INTERDISTRICT SPECIAL ATTENDANCE PERMITS.
PLACEMENT OF PUPILS RETURNING FROM CORRECTIONAL AND TREATMENT INSTITUTIONS.
PROCESSES FOREIGN STUDENT VISAS.
DIRECTS OPERATION OF PUPIL PLACEMENT COUNCIL.
CHAIRMAN OF APPEAL AND FACT FINDING BOARD INVOLVING SPECIAL ATTENDANCE PERMITS, PUPIL PLACEMENT COUNCIL DECISIONS AND POSSIBLE EXPULSION DECISIONS.
DIRECTS SUPERINTENDENT'S INVESTIGATIONS INVOLVING POSSIBLE EXPULSIONS.
DEAF AND HARD OF HEARING
270-6168
COORDINATOR
MR. JERROLD MC CLUSKEY
RESOURCE TEACHER
MRS. ANN REED
PHYSICALLY HANDICAPPED PROGRAMS
SUPERVISOR
MR. ROBERT CALHOUN
270-6161
HOMEBOUND TEACHERS
DISTRICT COUNSELOR SUPERVISORS
MR. ALEXANDER HARRIS 293-7962 REGION B
MR. BILL LINDSAY 273-4700 REGION A
MRS. FRANCES PATTERSON 563-0690 REGION C
SOUTHEAST SCHOOL CLINIC (DOYLE SITE)
DR., CLINICAL PSYCHOLOGIST
DR. ORVIA ELLISON
262-3401
CENTRAL SCHOOL CLINIC
SUPERVISOR
MR. KENT REPPELL
EXT. 321
PSYCHOLOGISTS
MR. DEAN SCOTT EXT. 521 SUPERVISING SCHOOL PSYCHOLOGIST
MR. RICHARD WILLIAMS EXT. 521 SENIOR PSYCHOLOGIST
REGIONAL PSYCHOLOGISTS
MRS. MURIEL MILLIGAN 293-7962 REGION B
MR. JOSEPH TOBY 273-4700 REGION A
MR. HERBERT WISDOM 563-0690 REGION C
ARTICULATION
MR. CHARLES MCKIAG
270-6164
SPEECH AND HEARING/APHASIC RESOURCE TEACHER
MR. REX SYDOW
270-6164
VISUALLY HANDICAPPED
270-6161
TRAINABLE MENTALLY RETARDED AND SEVERELY MENTALLY RETARDED
HOME TEACHING HEADS
270-6161
ORTHOPEDICALLY HANDICAPPED
270-6161
REGION A 273-4700
REGION B 293-7962
REGION C 563-0690
DISTRICT COUNSELORS
DISTRICT COUNSELORS
DISTRICT COUNSELORS
GUIDANCE AIDES
GUIDANCE AIDES
GUIDANCE AIDES
REGION A 273-4700
REGION B 293-7962
REGION C 563-0690
PSYCHOLOGISTS
PSYCHOLOGISTS
PSYCHOLOGISTS
GUIDANCE AIDES
GUIDANCE AIDES
GUIDANCE AIDES

APPENDIX C

PROCEDURES MANUAL
AND
JOB DESCRIPTION SAMPLES

SAN DIEGO UNIFIED SCHOOL DISTRICT NO. 2391

ADMINISTRATIVE REGULATIONS and PROCEDURES LEVELS: K-12

CLASSIFICATION: PUPILS, RIGHTS AND DUTIES PAGE: 1 OF 4

SUBJECT: NONDISCRIMINATION ON THE BASIS OF SEX EFFECTIVE: 7-21-75*
ISSUED: 9-2-75
REVISED:

REFERENCE: EDUCATIONAL AMENDMENTS OF 1972, TITLE IX, P. L. 92-318

A. PURPOSE AND SCOPE:

1. To outline the administrative regulations and procedures governing the implementation of the federal law, Educational Amendments of 1972, Title IX, mandating nondiscrimination on the basis of sex in educational programs and activities.

2. Title IX provisions cover both employees and students; however, district regulations regarding nondiscrimination in employment, and complaints alleging discrimination against employees are covered in established affirmative action and grievance procedures (see Alphabetical Index to Administrative Regulations and Procedures).

*3. Effective date for beginning of the phase-in period is 7-21-75 (see Section B.2.a.(4).

B. GENERAL:

1. Suggestions or questions concerning this procedure should be directed to the originating office (see Section G.).

2. Title IX provides that "no person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving federal financial assistance." Noncompliance can result in federal funds being withheld from the particular educational program or activity or part thereof in which such noncompliance is found. The general provisions of Title IX are as follows:

a. Educational and Related Programs. No course may be offered or educational program conducted separately for males or females, including "health, physical education, industrial, business, vocational, technical, home economics, music, and adult education courses."

(1) Physical Education - Separation and Grouping. Students may be separated within physical education classes or activities when engaging in the following sports: wrestling, soccer, football, basketball, and other sports, the purpose or major activity of which involves bodily contact. Students may be grouped in physical education classes on the basis of ability, provided specified standards of individual performance are utilized. These standards must be applied without regard to sex; however, "where use of a single standard of measuring skill or progress in physical education has an adverse effect on members of one sex . . . other appropriate standards which do not have such an effect" shall be used.

B. 2. a. (2) Athletics. No student may be excluded on the basis of sex from participation in interscholastic, intramural, or group athletics. Separate teams, however, are permitted when selection is based upon competitive skill, or for a contact sport (wrestling, football, basketball, baseball, field hockey, soccer, water polo, and softball). However, when there is only a team in a particular sport for one sex, the sport is not a contact sport, "opportunities for members of that sex have previously been limited, members of the excluded sex must be allowed to try out for the team offered."

(3) Expenditures. Equality of athletic opportunity is required for both male and female students. Although regulations do not require equivalency of expenditures for male and female athletics, the following factors are to be considered:

(a) Whether the selection of sports and levels of competition effectively accommodate the interests and abilities of members of both sexes.
(b) Provision of equipment and supplies.
(c) Scheduling of games and practice time.
(d) Travel and per diem allowance.
(e) Opportunity to receive coaching.
(f) Assignment and compensation of coaches.
(g) Provision of locker rooms, practice and competitive facilities.
(h) Provision of medical and training facilities and services.
(i) Publicity.

(4) Implementation Period. Secondary schools must comply with the regulations for physical education classes, interscholastic, intramural, and club athletic activities within three years; elementary schools must comply with regulations for physical education classes within one year.

(5) Sex Education. Those portions of sex education classes dealing "exclusively with human sexuality" may, but need not, be conducted in separate sessions for boys and girls.

(6) Choruses in which participating students are selected on the basis of vocal range are permitted, even if they result in being composed primarily of either male or female students.

b. Textbooks. The regulations explicitly provide that the choice of textbooks and other curriculum materials is left to the district.

c. Counseling. The same counseling services must be offered to both male and female students. In addition, different counseling and testing materials may not be used for male and female students.

d. Marital Status or Pregnancy. Students may not be discriminated against because of marital status or pregnancy. If separate programs are offered for pregnant students, these programs must be voluntary,

B. 2. d. (continued)
and the educational program must be the same as that offered to other students. A doctor's certificate may be required for continued participation in the normal educational program or activity if such a certificate is required of all students who may be physically or emotionally unable to participate in a program or activity.

e. Employment Counseling and Assistance to Students. Employment assistance, when available, shall not discriminate on the basis of sex.

3. Responsibilities

a. Self-Evaluation. Each administrator having responsibility for a program or activity shall conduct a self-evaluation within one year of the effective date of this procedure, modify any policies or practices inconsistent with Title IX regulations, and take appropriate remedial steps to eliminate the effects of past discrimination. Records of this self-evaluation must be kept for three years.

Revised 1-29-76

b. Districtwide Coordinators of Compliance

(1) On matters affecting students and programs: Deputy Superintendent, Operations.

(2) On matters affecting personnel: Assistant Superintendent, Personnel Division.

4. Complaints Alleging Noncompliance

a. Complaints alleging discrimination against employees shall be handled through established affirmative action and grievance procedures (see Alphabetical Index to Administrative Regulations and Procedures).

b. Complaints alleging discrimination against students shall be resolved on an informal basis at the local level whenever possible; i.e., by the principal.

(1) A student who wishes to have a grievance heard under this procedure must initiate action within twenty (20) working days of the time of the incident leading to the grievance.

(2) Appeals. The grievant may appeal the decision of the principal to the elementary or secondary regional director, as appropriate. The appeal shall be in writing and must be submitted within ten working days following the decision of the principal. The regional director shall hear both sides of the case alleging discrimination and render his/her decision within twenty (20) working days following receipt of the complaint. Subsequent appeals shall be made through normal administrative channels, with a final decision being made by the Board of Education, if necessary.

C. FORMS USED AND AUXILIARY REFERENCES:

1. Brochure, "Parents' Rights and Responsibilities under New Federal Legislation," available from Public Information Office.

D. PROCEDURE:

1. School notifies students and parents of the district's policy of nondiscrimination on the basis of sex, through issuance of the brochure, "Parents' Rights and Responsibilities under New Federal Legislation," which includes the Title IX notification requirement. This shall be supplemented through regular notification in other media available to parents and students, such as the P.-T.A. bulletin, school newsletters, or newspapers.

2. Complaints of alleged discrimination on the basis of sex are handled as outlined in Section B.4.

E. REPORTS REQUIRED:

F. RECORD RETENTION AND DESTRUCTION:

G. ORIGINATING OFFICE: Elementary Schools Division
Secondary Schools Division

H. APPROVED BY:

Wm. H. Stegeman
Deputy Superintendent
Operations

Thomas L. Gaskamp
Superintendent

JOB DESCRIPTIONS

APR 2 1976

A3

SAN DIEGO CITY SCHOOLS
Personnel Division

ELEMENTARY CLASSROOM TEACHER - GRADES 1-3

Brief Description of Position:

Provides an educational program for pupils in grades 1, 2, 3, or a combination thereof, and assists in other school programs as assigned.

Major Duties and Responsibilities:

1. Teaches reading, language arts, social studies, mathematics, science, art, health, physical education, and music to pupils in a classroom, utilizing course of study adopted by the Board of Education, and other appropriate learning activities.
2. Instructs pupils in citizenship and basic subject matter specified in state law and administrative regulations and procedures of the school district.
3. Develops lesson plans and instructional materials and provides individualized and small group instruction in order to adapt the curriculum to the needs of each pupil.
4. Translates lesson plans into learning experiences so as to best utilize the available time for instruction.
5. Establishes and maintains standards of pupil behavior needed to achieve a functional learning atmosphere in the classroom.
6. Evaluates pupils' academic and social growth, keeps appropriate records, and prepares progress reports.
7. Communicates with parents through conferences and other means to discuss pupil's progress and interpret the school program.
8. Identifies pupil needs and cooperates with other professional staff members in assessing and helping pupils solve health, attitude, and learning problems.
9. Creates an effective environment for learning through functional and attractive displays, bulletin boards, and interest centers.
10. Maintains professional competence through inservice education activities provided by the district and/or self-selected professional growth activities.
11. Participates cooperatively with the appropriate administrator to develop the method by which he will be evaluated in conformance with district guidelines.

Other Duties and Responsibilities:

1. Selects and requisitions books and instructional aids; maintains required inventory records.
2. Supervises pupils in out-of-classroom activities during the assigned working day.
3. Administers group standardized tests in accordance with district testing program.
4. Participates in curriculum development programs as required.
5. Participates in faculty committees and the sponsorship of pupil activities.
6. Performs other duties as assigned.

Supervision Exercised or Received:

Under the immediate direction of the site administrator. May plan and supervise the work of classified personnel.

Assignment Type and Work Year:

Assignments in this class may be full-time or part-time. Work year may be 10-, 11-, or 12-months, or one of the tracks in the year-round school program.

Elementary Classroom Teacher - Grades 1-3

POSITION QUALIFICATIONS

Minimum Qualifications:

1. Credential: Partial-fulfillment credential as required by California law.
2. Education: Bachelor's degree, including all courses needed to meet credential requirements.
3. Experience: Student teaching (8 semester hours or 180 clock hours) or two years of full-time elementary classroom experience.
4. Personal Qualities: Appearance, grooming, and personality which establish a desirable example for pupils. Ability to meet district standards for physical and mental health. Better than average recommendations from student teaching supervisors or other professionals who have observed the personal characteristics, scholastic attainment, and classroom performance of the teacher.

Goals of Effective Performance:

To create a flexible primary grade program and a class environment favorable to learning and personal growth; to establish effective rapport with pupils; to motivate pupils to develop skills, attitudes and knowledge needed to provide a good foundation for upper elementary grade education, in accordance with each pupil's ability; to establish good relationships with parents and with other staff members.

Examples of Factors Which May Lead to More Effective Performance:

1. Credential: Clear credential as required by California law.
2. Education: Master's degree with an academic subject matter major. Depth of training in one or more areas of the elementary school curriculum. Knowledge of current trends and research concerning the growth and development of primary level children. Participation in a variety of relevant inservice education classes, demonstration lessons, and workshops.
3. Professional Experience: A minimum of three years of elementary classroom teaching experience. Classroom teaching at more than one grade level, and in two or more schools, preferably in different socio-economic areas. Experience in meeting the needs of slow learners and educationally handicapped pupils. Participation in pilot or experimental studies of the primary grade program. Participation in curriculum writing and/or curriculum committees on a district level. Professional assignments such as demonstration teacher, inschool or curriculum resource teacher, teacher on special assignment, or student teacher supervisor.
4. Other Experience: Development of a broad background of general knowledge and an understanding of human relationships through such activities as travel, military service, or work experience other than as a classroom teacher.

SAN DIEGO CITY SCHOOLS
Personnel Division

SCHOOL SECRETARY I

ESSENTIAL FUNCTION

Under general supervision, assumes primary responsibility for one or more secretarial or clerical functions as assigned in an elementary school. (See current school classification and assignment formulas.)

DUTIES

Acts as secretary to the principal of a small elementary school and performs any combination of the following duties: transcribes dictated material of average difficulty either from shorthand notes or from a dictating machine; acts as office receptionist; schedules appointments, meetings, and events; explains procedures to pupils, staff, and the public; maintains operational records and files; prepares reports on personnel, pupils, supplies facilities, and equipment; prepares correspondence, bulletins, and notices; enrolls and transfers students; operates standard office machines; receives, records, and prepares school funds for banking; maintains time sheets and minor financial accounts; verifies and processes student absence and attendance data; evaluates and processes grade transcripts; records grades and test scores, and computes averages; maintains acquisition and circulation records for books and audiovisual material and equipment; in the absence of the school nurse, provides illness and accident attention and first aid for pupils; may train and supervise clerical assistants and pupil monitors; performs other duties.

MINIMUM QUALIFICATIONS

One year (within the last 10 years) of full-time equivalent, paid office clerical or stenographic experience. For present employees, 10 full-time equivalent months (one school year) is acceptable. One year of college-level training in secretarial science or business administration may be considered for substitution of the experience requirement.

Ability to take dictation of average difficulty at 80 w.p.m., and to type accurately and neatly at a net, corrected speed of 40 w.p.m.; knowledge of modern office methods and procedures and the use of standard office machines; ability to exercise judgment, tact, and diplomacy; ability to train and supervise others, and to assume responsibility. Ability to compose routine correspondence, bulletins, and reports using proper grammar, spelling, and punctuation; ability to perform arithmetic computation.

6/75 revised

SAN DIEGO CITY SCHOOLS
Personnel Division

ELEMENTARY PRINCIPAL

A. Primary function: To serve under the governing board and the Superintendent as the chief executive officer of one or more schools with total responsibility to manage all affairs of the school within district policy and procedures, including general control and supervision of all certificated and classified employees assigned to serve in the school.

B. Directly responsible to: Elementary Schools Director.

C. Assigned responsibilities:

1. Provides leadership to the staff in assessing school needs and determining objectives as the basis for developing long- and short-range plans for the school of assignment.
2. Interprets and implements the curriculum program in the light of individual school needs.
3. Provides leadership to the staff so that innovations leading toward instructional and program improvement are facilitated, including direction and coordination of pilot programs.
4. Establishes an effective school administrative organization with clear lines of responsibility and with the necessary delegation of authority.
5. Identifies, provides, assigns, and coordinates inservice growth opportunities for personnel within the school.
6. Supervises and evaluates the performance of all assigned personnel, provides counseling and assistance as indicated, recommends appropriate action in cases of substandard performances, and identifies and encourages individual teachers with leadership potential.
7. Assigns all pupils in such a way as to encourage their optimum growth.
8. Carries out a program of communications and community relations as a means of interpreting and furthering the school program through PTA, CAC, and other community organizations.
9. Develops school plans and organizational procedures for the safety, discipline, and conduct of pupils, including conferences with parents.
10. Plans, coordinates, and evaluates the on-site program of pupil services, including guidance, counseling, health services, and testing.
11. Plans, supervises, and directs the business operation of the school, including the management and monitoring of all assigned budgets, both district and special funded.
12. Makes plans for the most effective use of curriculum materials, instructional supplies, equipment, building facilities, and school grounds.
13. Makes periodic appraisals of pupil progress, and directs reports to parents.
14. Serves as a district officer in communication between central administration and teachers and classified employees in the schools, and interprets and implements district policies in individual schools.
15. Plans, coordinates, and reviews the work of resource teachers and curriculum consultants assigned to assist teachers in the instructional program.
16. Carries on a human relations program in order to maintain high morale of the school staff.
17. Recruits, trains, and provides for effective utilization of paraprofessionals and volunteers, and evaluates such services.

18. Serves as assigned on districtwide committees.
19. Performs other duties as assigned.

D. Minimum qualifications:

Applicable credentials: E-2 or equivalent.

Training and experience: Credential requirement to be supplemented by four years of experience as an Elementary Vice Principal or other equivalent educational administration experience.

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